Australian Government
Department of Social Services

myagedcare

My Aged Care Assessor Portal User Guide

Part Two: Team Leader, Assessor, Delegate and Delegate Support Functions

June 2015

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1 Background and overview of the assessor portal

1.1 Purpose of the Guide

The My Aged Care Assessor Portal User Guide: Part Two – Team Leader, Assessor, Delegate and Delegate Support Functions (Assessor Portal User Guide) outlines how assessment organisations will use the My Aged Care assessor portal (the assessor portal).

The Assessor Portal User Guide is split into two parts as follows:

- Part One provides an overview of the portal and describes the functions that an individual with the Administrator role in the assessor portal will perform.
- Part Two (this document) provides an overview of the portal and describes the functions that an individual with the Team Leader, Assessor, Delegate or Delegate Support role in the assessor portal will perform.

It is recommended that this Guide is read after the My Aged Care Guidance for Assessors document (Guidance for Assessors) available at dss.gov.au/MyAgedCare. Guidance for Assessors will help you understand the new concepts and provide contextual information about functions that you will need to undertake via the assessor portal.

1.1.1 What this Guide does not cover

This Guide does not cover:

- How to nominate the person in your organisation as your first Organisation Administrator in the assessor portal
- Detailed instructions on how to obtain an AUSkey.

1.1.2 Document Key

This is used to highlight points that assessors need to pay particular attention to.

This is used to highlight a function that a person with a particular role within the assessor portal (Administrator, Team Leader, Assessor, Delegate, Delegate Support) will need to undertake.

The latest version of this document is available at dss.gov.au/MyAgedCare.

1.2 Key Terms

Table One: Key terms and descriptions

Key Term	Description
ACAT	Aged Care Assessment Teams (ACATs) conduct face-to-face comprehensive assessments to determine a client's eligibility for care types under the *Aged Care Act 1997*, with approval subject to a decision by an ACAT Delegate.
Action Plan	A summary of the outcomes of screening conducted by My Aged Care contact centre staff. An action plan includes information about activities that will facilitate appropriate assessment or service referrals. Assessors, service providers and clients can view a client's action plan via the My Aged Care portals.
Administrator	The person nominated on the My Aged Care Organisation Administrator Registration Form to be the first person from an organisation to log in to the My Aged Care assessor portal. Administrators are responsible for setting up the organisation, including managing staff accounts in the portal.
Assessor	A person who is assigned the Assessor role in the assessor portal will be responsible for registering clients and representatives (if required), entering assessment information (including developing Support Plans) on client records, and sending referrals for service(s), and referrals to waitlists. A person can be assigned as a Home Support Assessor or a Comprehensive Assessor in the assessor portal. The Assessor role should be assigned in accordance with the role the person performs in their organisation, and the completion of associated training.
AUSkey	AUSkey is a secure login that identifies you when you use participating government online services on behalf of your business. AUSkeys are obtained from the Australian Business Register, and registration is free.

Key Term	Description
CHSP	From 1 July 2015, the Commonwealth Home Support Programme (CHSP) will bring together: • Commonwealth Home and Community Care (HACC) Program • Planned respite from the National Respite for Carers Program (NRCP) • Day Therapy Centres (DTC) Program • Assistance with Care and Housing for the Aged (ACHA) Program.
Client Record	People seeking access to aged care services will have a client record created by My Aged Care contact centre staff. The client record will include client details (and carer or representative details), details about assessments and the action support plan(s), and information about service(s) received. Clients will be asked to provide consent to enable their client record to be shared with assessors and service providers. Assessors and service providers will update information on the client record, and clients and their representatives will be able to view this information on the My Aged Care client portal, via myGov.
Client service information	Information about services that a provider delivers to a client. The provider is required to enter this information on the client record via the My Aged Care provider portal. Assessors and clients (and their representatives) will be able to view this information on the My Aged Care client portal, via myGov.
Delegate	A person who is assigned the Delegate role in the assessor portal will be responsible for entering assessment information (including developing Support Plans), making Delegate decisions, and printing client information (including Delegate notification letters). Current ACAT Delegates are expected to perform this role in the assessor portal.
Delegate Support	A person who is assigned the Delegate Support role in the assessor portal will be responsible for printing client information (including Delegate notification letters) to support the Delegate.
Inbound referral form	An online form accessed from the My Aged Care website. The form can be used to recommend a person for aged care services. The form may initiate registration, screening, assessment and referral for service.

Key Term	Description
NSAF	National Screening and Assessment Form (NSAF) used by My Aged Care contact centre staff and assessors (RAS and ACATs) to ensure a nationally consistent and holistic screening and assessment process.
Outlet	An outlet is how your organisation is represented in the assessor portal. Electronic referrals will be sent by contact centre staff for assessment services. Assessment organisation staff will also be allocated to outlets.
RAS	The My Aged Care Regional Assessment Service (RAS) will conduct a face-to-face home support assessments for clients needing access to Commonwealth Home Support Programme (CHSP) services.
Reassessment	A reassessment will be undertaken when there is a significant change in a client's needs or circumstances which affect the objectives of the existing support plan.
Referral code	A five digit code given to the client by My Aged Care contact centre staff, or assessors to allow them to visit different service providers to discuss their needs prior to choosing their preferred provider. Referral codes are generated for individual services. Clients can choose to have a referral code given to them rather than choosing an electronic referral method.
Referral for assessment	A referral sent by My Aged Care contact centre staff requesting an assessment (home support or comprehensive) for a client.
Referral for service	A referral sent by either My Aged Care contact centre staff or assessors requesting services for a client. Referrals can be sent electronically, or a client can be issued a referral code.

Key Term	Description
Representative	Clients can nominate one or more representative(s), (i.e. a carer), to act on their behalf. The My Aged Care system enables a representative to be classified as Regular or Authorised. You will also need to indicate a 'representative type': Financial, Care, or Financial and Care. Regular representatives are nominated by the client, for instance a family member can be nominated as a representative so they can view the client record. This consent can be given verbally, in writing or in any other way that communicates the authority to act on behalf of the client. Authorised representatives are generally able to act for a client based on provisions within federal, state or territory law, for instance, Power of Attorney. When adding a representative to a client's record, you must indicate that consent has been obtained from all parties in order for the relationship to be established in the system.
Review	An evaluation of a client's Support Plan undertaken by the RAS. A review can be requested by the client, service provider, or scheduled by an assessor. The review may result in a change in services, or a further assessment.
Service delivery area	The area where an organisation delivers services. This can be from a set location (provider location) or to an area where the service are provided to the client in their own home (at client location).
Service finders	A search function available on the My Aged Care website that allows an individual to view information about services.
Support Plan	A plan developed by the RAS or ACAT with the client. The Support Plan identifies the client's needs, goals and service preferences. Assessors and providers will be able to view a client's Support Plan via the My Aged Care portals. Clients and their representatives will be able to view this information on the client portal, via myGov.
Team Leader	A person who is assigned the Team Leader role in the assessor portal will be responsible for managing referrals (accepting or rejecting) for assessment and assigning referrals to staff.
Wallet check	An identification check that an assessor or service provider will undertake to ensure duplicate client records are not created. The wallet check involves sighting two documents that identify the client, and noting this on the client's record.

1.3 Introduction to using the assessor portal

The My Aged Care assessor portal is used to:

- Create client records (in certain circumstances)
- Manage referrals for assessment issued by My Aged Care contact centre staff
- Access and update client records
- Conduct assessments (home support and comprehensive) using the NSAF
- Develop a Support Plans
- Support Delegation processes (after comprehensive assessments), including sending the Delegate decision letters
- Refer clients for aged care services or further assessment
- Generate reports
- Access forms (e.g. Application form).

From July 2015, assessment organisations will be able to access the myAssessor App or a printed version of the NSAF to support assessments to be conducted in circumstances where the assessor does not have access to the internet. Further information about the myAssessor App is available at **Attachment C**.

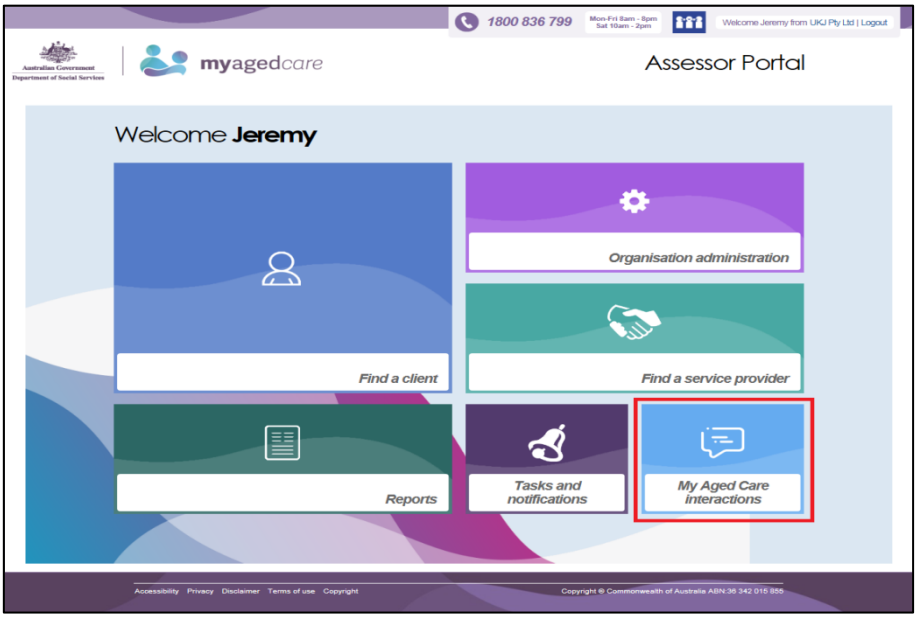
Staff must have an individual AUSkey linked to their organisation to access the assessor portal. For more information, visit https://abr.gov.au/AUSkey/.

Please note: due to the continued operation of the jointly government funded Home and Community Care programme in Victoria and Western Australia, the changes to My Aged Care in 2015 differs in these states. More information is available in Guidance for Assessors.

1.3.1 Further information, enquiries and technical support

A My Aged Care service provider and assessor helpline (1800 836 799) is available. The helpline answers enquiries relating to the My Aged Care system and provides technical support. The helpline is available between 8am to 8pm Monday to Friday and 10am to 2pm Saturday, local time across Australia.

You can view a record of enquires you have made to the helpline via the assessor portal, by selecting the 'My Aged Care Interactions' icon on the homepage.



Further information to support the use of the assessor portal (including fact sheets, videos, FAQs) is available at: www.dss.gov.au/MyAgedCare.

1.4 Preparing to access the assessor portal

The steps to prepare to access the assessor portal are outlined below.

1.4.1 AUSkey and technology requirements

Prior to accessing the My Aged Care assessor portal, each staff member who will use the assessor portal need their own AUSkey that is linked to an individual email address. They will need this prior to logging on for the first time.

1.4.2 What is AUSkey?

AUSkey is a secure login that identifies you when you use participating Government online services on behalf of your business. Obtaining an AUSkey is a simple process and is free. Many organisations already use an AUSkey to interact with other Government services. Each AUSkey is linked to an Australian Business Number (ABN) and can be stored on a computer or a USB stick for staff that use multiple windows-based computers.

If your organisation does not currently use AUSkey, your organisation must register for an Administrator AUSkey. To register for the first AUSkey you need to be an eligible associate recorded on the Australian Business Register (ABR) for that ABN. You can register yourself or someone else for the first AUSkey. The first person to be registered will have an Administrator AUSkey and can set up other AUSkey Administrators within the organisation.

After the first AUSkey is issued, there can be unlimited AUSkeys linked to that ABN. In most cases, each person wanting to use participating government online services on behalf of a business must have a separate AUSkey. The registration process for subsequent AUSkey users depends on the type of AUSkey you need.

What you will need to provide to register for an AUSkey is outlined below:

Administrator AUSkey	• the ABN of the business you want the AUSkey to be linked to; • your full legal name; • your date of birth; and • an email address that only you have access to.
Standard AUSkey for other Staff	• an Administrator AUSkey user's email address; • your full legal name; and • an email address that only you have access to.

The Administrator AUSkey holder is also able to set up Standard AUSkeys for all staff who will use the assessor portal. Administrator AUSkey holders can upload all staff AUSkeys in a batch by uploading a CSV file to ABR (for more information go to the ABR website https://abr.gov.au/AUSkey/Help-and-support/Registering-for-AUSkey-troubleshooting/Register-more-than-one-person/). Alternatively, staff are able to self-register online.

1.4.3 What will you need to use an AUSkey?

You will need a computer with an internet connection and a standard internet browser that supports AUSkey, such as Internet Explorer, Safari or Firefox. To use AUSkey you will need to use an alternative browser that is compatible.

As of April 2015, AUSkey is no longer compatible with Google Chrome. To use AUSkey you will need to use an alternative browser that is compatible.

To use AUSkey to log in to the assessor portal, the computer will need certain software installed. If you and your staff do not have administration rights to the computer, you will need to consult your organisation's IT support area to ensure the appropriate software is installed.

1.4.4 Organisation access requirements

To access the assessor portal, your organisation must nominate an individual to be your Organisation Administrator (a role within the assessor portal). As with other staff members, the Organisation Administrator must have an AUSkey. This person is the first person from your organisation to log in to the portal. They will be responsible for setting up organisational details and access to the portal for other staff. If you require further information about how to nominate your Organisation Administrator, please email the Department at myagedcare@dss.gov.au.

1.4.5 Where can you go for more information?

Further details of software and compatibility can be found at https://abr.gov.au/AUSkey/Help-and-support/Setting-up-AUSkey-troubleshooting/AUSkey-compatibility/

For more information: visit the Australian Business Register (ABR) website at https://abr.gov.au/AUSkey/ or call the ABR national service desk (1300 287 539).

It is also possible to send an email query to the Australian Taxation Office (ATO) technical helpdesk technical.help@ato.gov.au.

1.5 How and when to direct people to My Aged Care

Clients receiving services prior to July 2015 do not need to register with My Aged Care unless their needs and/or circumstances change.

From July 2015, people seeking access to aged care services for the first time, or people whose needs have changed, will need to contact the My Aged Care contact centre to discuss their aged care needs and have a client record created.

From 1 July 2015, people seeking access to Commonwealth funded aged care services should be directed to My Aged Care. You can direct people to the My Aged Care contact centre in the following ways:

- Provide the person with the My Aged Care contact centre phone number (1800 200 422)
- Send an 'Inbound referral' (accessed from myagedcare.gov.au) requesting that contact centre staff call the person
- Send a fax with information about the person.

Assessors can also register the person with My Aged Care and undertake an assessment.

Contact centre staff will create a client record for the person and ask a number of questions to work out their potential aged care needs. This will enable contact centre staff to refer the client for assessment and/or service(s).

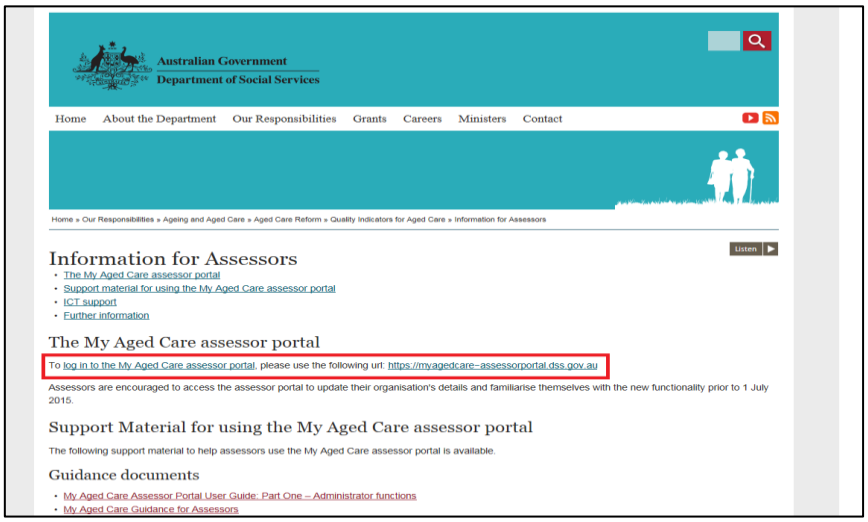
There will be times where an Assessor attends a client's home to conduct an assessment, and finds another person (not registered with My Aged Care) who needs an assessment. The Assessor should register the person with My Aged Care and undertake an assessment (after contacting the My Aged Care contact centre to request that a referral is sent to their organisation).

1.6 How to log in to the assessor portal

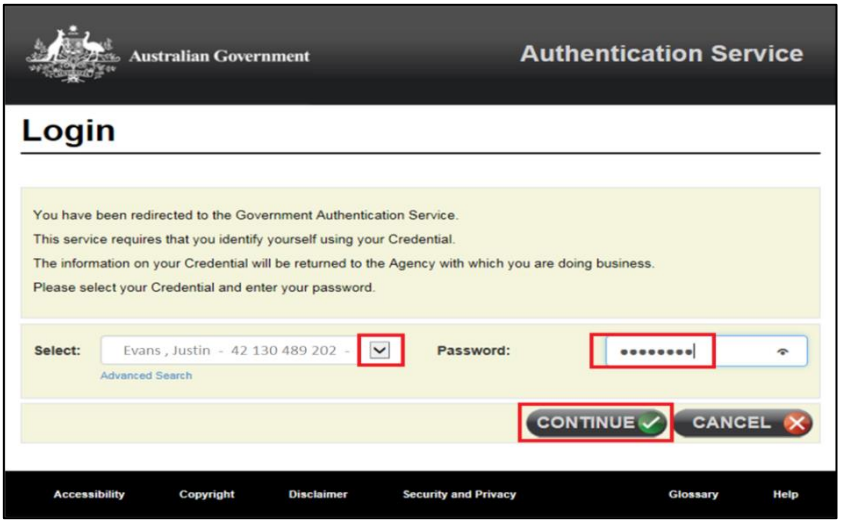
The steps you will follow to log in to the assessor portal (after the first time) are outlined below. The first time log in process is different. The steps you need to take to log in for the first time are outlined in **Attachment A.**

> You must have an individual AUSkey linked to your organisation to access the assessor portal. For more information, visit https://abr.gov.au/AUSkey/.

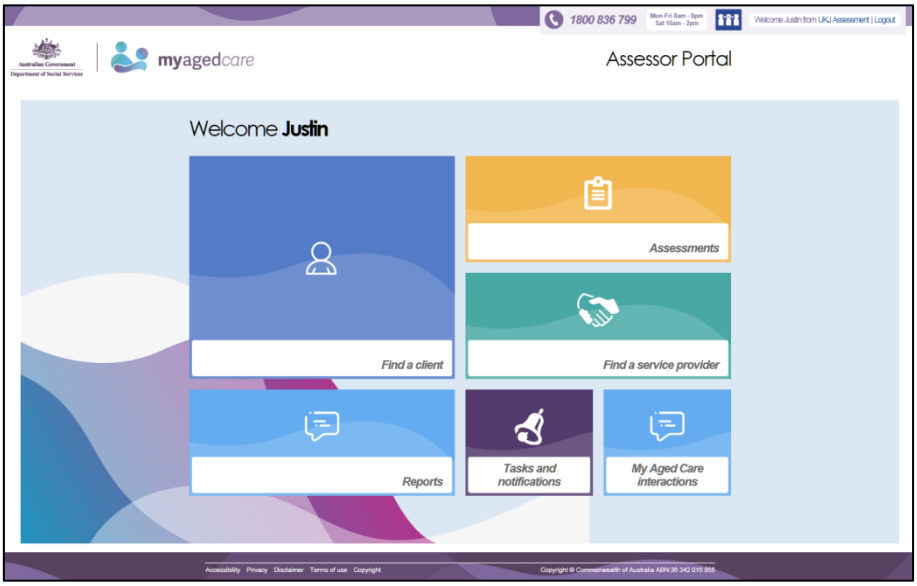
Step One: Go to the 'Information for Assessors' section of the DSS website at www.dss.gov.au/information-for-assessors and select the 'My Aged Care Assessor Portal' link. The assessor portal can also be accessed at: https://myagedcare-assessorportal.dss.gov.au.


Australian Government
Department of Social Services
Home
About the Department
Our Responsibilities
Grants
Careers
Ministers
Contact
Information for Assessors
The My Aged Care assessor portal
Support material for using the My Aged Care assessor portal
ICT support
Further information
The My Aged Care assessor portal
To log in to the My Aged Care assessor portal, please use the following url: https://myagedcare-assessorportal.dss.gov.au
Assessors are encouraged to access the assessor portal to update their organisation's details and familiarise themselves with the new functionality prior to 1 July 2015.
Support Material for using the My Aged Care assessor portal
The following support material to help assessors use the My Aged Care assessor portal is available.
Guidance documents
My Aged Care Assessor Portal User Guide: Part One – Administrator functions
My Aged Care Guidance for Assessors

Step Two: An Australian Government 'Authentication Service' page will be displayed. Select your AUSkey credentials from the drop down list. Enter your AUSkey password and select 'Continue'.



Step Three: After you select ‘Continue’ the assessor portal homepage will be displayed.



1.7 Staff roles in the assessor portal

People can be allocated a number of roles for one or more outlets in the assessor portal.

For the RAS, roles include:

- Administrator
- Assessor
- Team Leader.

For ACATs, roles include:

- Administrator
- Assessor
- Team Leader
- Delegate
- Delegate Support.

People can be assigned more than one role in the assessor portal at the same time. If you are assigned more than one role, your portal homepage will display the functions for all the roles you are assigned.

The level of access to functions within the assessor portal depends on the role a person is assigned in the assessor portal. The roles should be assigned in accordance with the role the person performs within their organisation, and the completion of the associated training.

People who perform a Delegate role will need to be assigned the Delegate role as well as the Assessor role in the assessor portal.

The purpose of the Team Leader role within the assessor portal is to manage referrals. This may be different to your existing organisational structure, and who has completed the My Aged Care Team Leader training. It is up to each assessment organisation to decide who performs the functions of the Team Leader role in the assessor portal

The table below outlines the key functions for roles within the assessor portal. It includes both client focused and organisation focused tasks.

	Key Functions	Roles				
		Administrator	Team Leader	Assessor	Delegate	Delegate Support
Client Focussed	Register a client/representative		✔	✔		
	Search for and view a client record		✔	✔	✔	✔
	Enter assessment information (including Support Plan) on client record			✔	✔	
	Send referrals for service(s)			✔		
	Accept and reject referrals		✔			
	Approve Decisions				✔	
	Print client information for the Delegate				✔	✔
Organisation Focussed	View tasks and notifications	✔	✔	✔	✔	✔
	View My Aged Care interactions	✔	✔	✔	✔	✔
	Request a change to contractual information	✔				
	Manage staff accounts: add, edit, deactivate	✔				

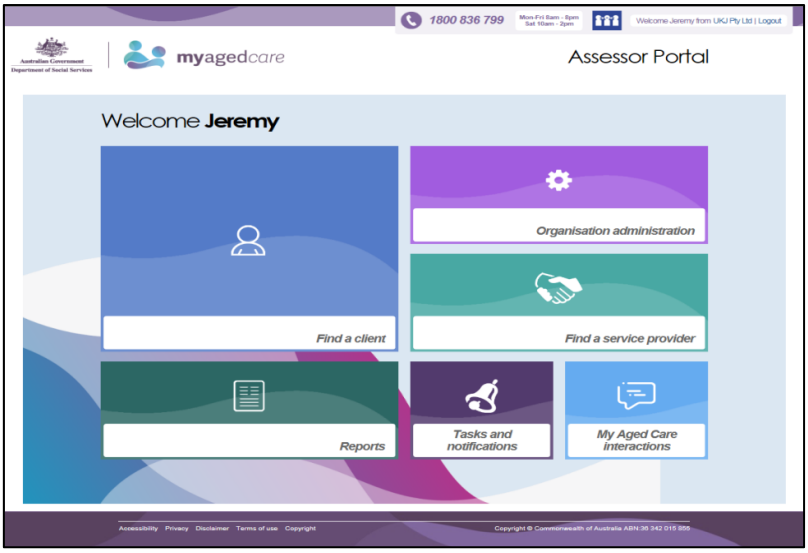
For more information about the key functions and roles in the assessor portal, see Guidance for Assessors, available at dss.gov.au/myagedcare.

1.7.1 Homepage views

The options displayed on the homepage of the assessor portal will vary depending on your role(s). If you are assigned more than one role in the assessor portal, you will see the functions for all the roles you are assigned on your homepage.

1.7.1.1 Administrator homepage

If you log in to the assessor portal as an Administrator, you will see 'Organisation administration', 'Reports', 'Find a service provider', 'Find a client', Tasks and notifications', and 'My Aged Care interactions' icons on your homepage.

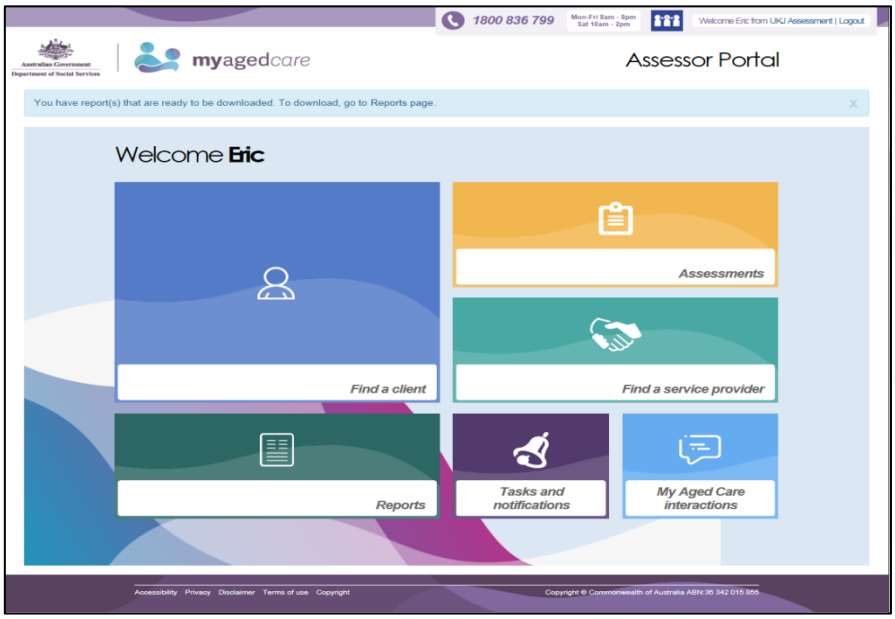


1.7.1.2 Team Leader homepage

If you log in to the assessor portal as a Team Leader, you will see 'Referrals', 'Find a client', 'Find a service provider', 'Reports', 'Tasks and notifications', and 'My Aged Care interactions' icons on your homepage.

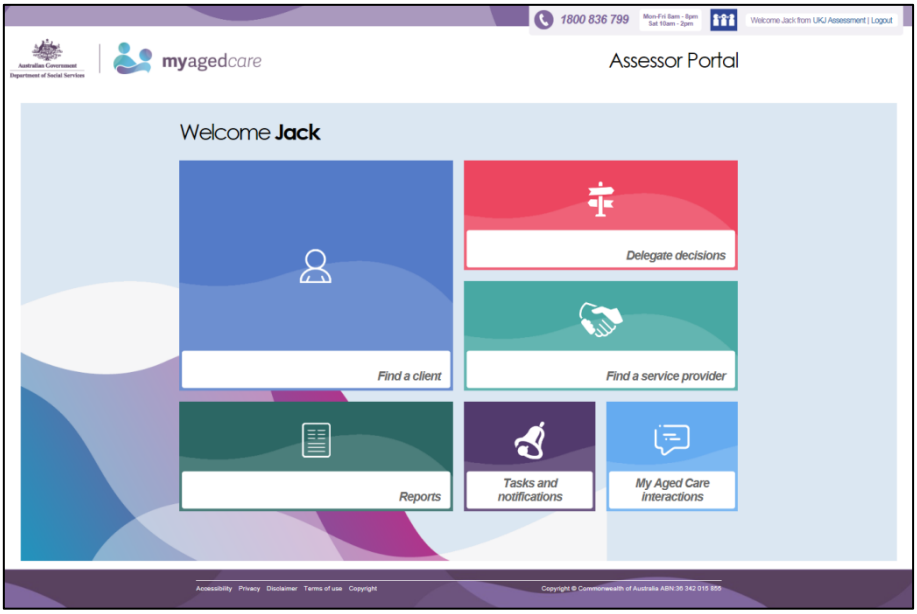
1.7.1.3 Assessor homepage

If you log in to the assessor portal as an Assessor, you will see ‘Assessments’, ‘Find a client’, ‘Find a service provider’, ‘Reports’, ‘Tasks and notifications’ and ‘My Aged Care interactions icons on your homepage.



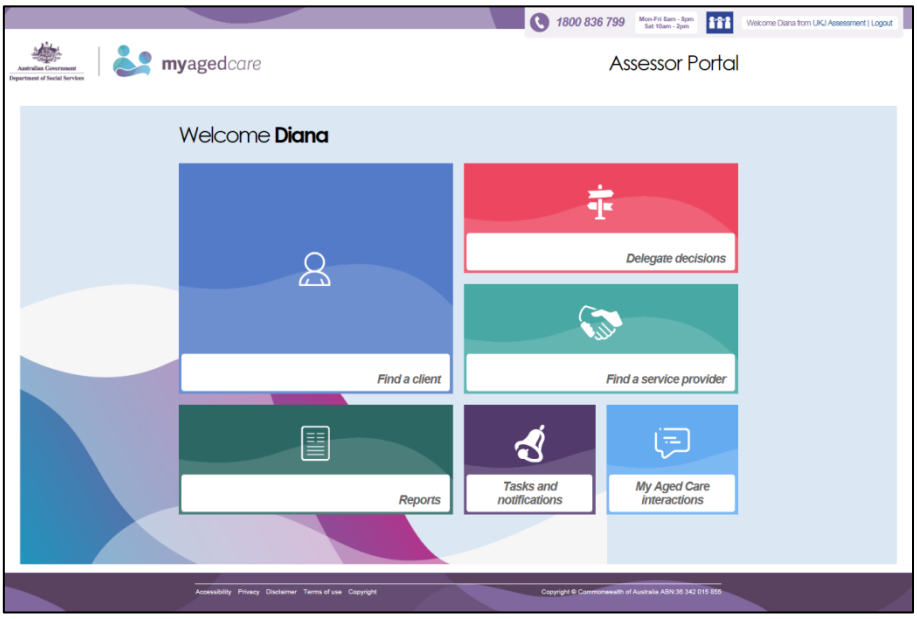
1.7.1.4 Delegate homepage

If you log in to the assessor portal as a Delegate, you will see ‘Delegate decisions’, ‘Find a client’, ‘Find a service provider’, ‘Reports’, ‘Tasks and notifications’, and ‘My Aged Care interactions’, icons on your homepage.



1.7.1.5 Delegate Support homepage

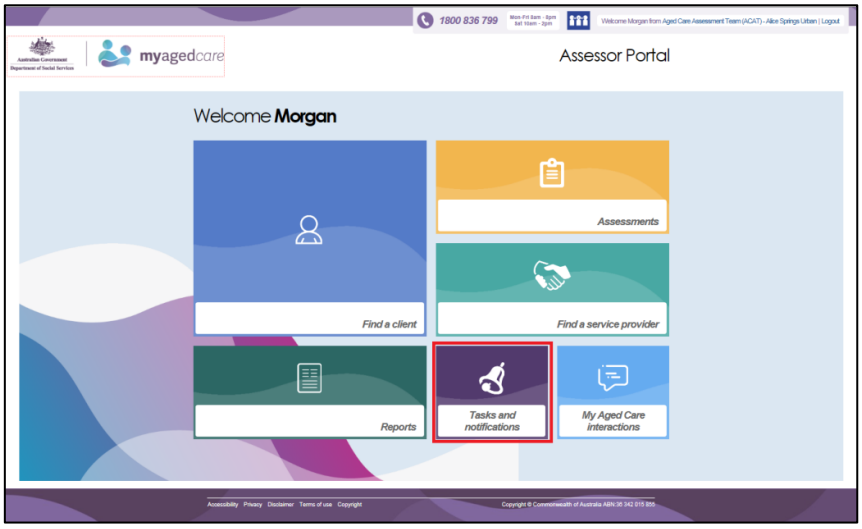
If you log in to the assessor portal as a Delegate Support, you will see ‘Delegate decisions’, ‘Find a client’, ‘Find a service provider’, ‘Reports’, ‘Tasks and notifications’, and ‘My Aged Care interactions’, icons on your homepage.



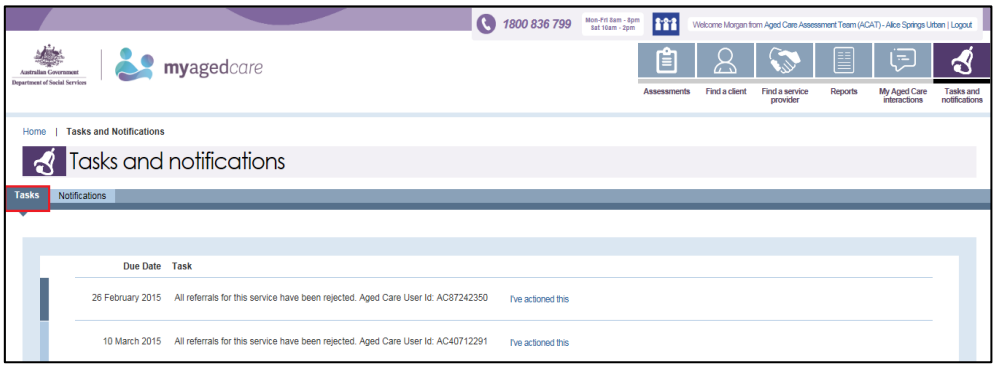
1.8 Viewing tasks and notifications

Administrators, Team leaders, Assessors, Delegates and Delegate Supports will be able to view tasks and notifications. More information about tasks and notifications is available in Guidance for Assessors. The steps to view tasks and notifications are outlined below.

Step One: From the assessor portal homepage select 'Tasks and notifications'.



Step Two: To view tasks, select 'Tasks'.



Step Three: To view notifications, select 'Notifications'

1800 836 799
myagedcare
Assessments
Find a client
Find a service provider
Reports
My Aged Care interactions
Tasks and notifications
Home | Tasks and Notifications
Tasks and notifications
Tasks
Notifications
Date received
Notification
23 June 2015
Activity type: Notification
Activity sub type: Formal Delegate Decision
Status: Done
A Delegate decision has been made on the following Assessment - Assessment: 1-OIEL; Aged Care User Id: AC19807502
23 June 2015
Activity type: Notification
Activity sub type: Formal Delegate Decision
Status: Done
A Delegate decision has been made on the following Assessment - Assessment: 1-2J7UF; Aged Care User Id: AC50747161

Team Leader

2 Team Leader role

All referrals for assessment from the My Aged Care contact centre are managed by the person (or people) assigned the Team Leader role in the assessor portal.

Referrals have a priority status (low, medium, high). Further information about the management of referrals, including the information contained in a referral, and the priority status, is in Guidance for Assessors, available on dss.gov.au/myagedcare.

This section steps you through how to:

- View referrals
- Accept referrals
- Assign a referral to an Assessor
- Indicate that an assessment will be undertaken outside My Aged Care
- Reassign or unassign referrals
- Reject referrals.

2.1 Managing referrals

Once a referral is received, Team Leaders will manage referrals by either:

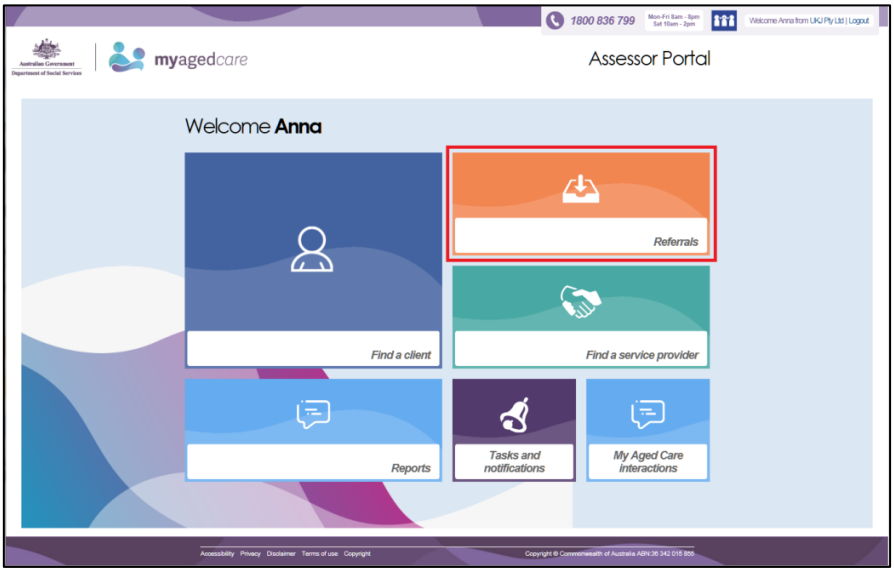
- Accepting the referral; or
- Rejecting the referral.

Once accepted, the Team Leader will assign the referral to an Assessor.

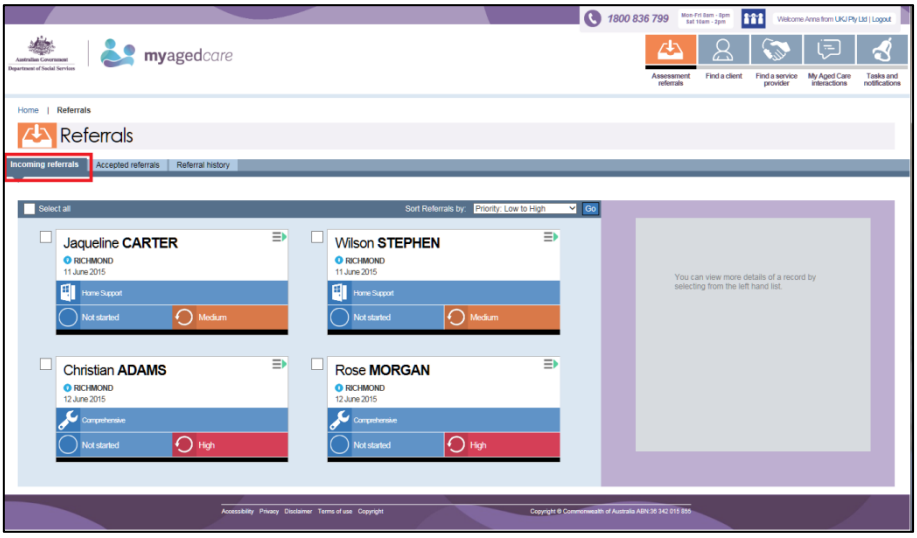
2.2 Viewing referrals

To view referrals follow the steps below.

Step One: From the homepage, select ‘Referrals’.



Step Two: You will be view referrals via the ‘Incoming referrals’, ‘Accepted referrals’ and ‘Referral history’ tabs.

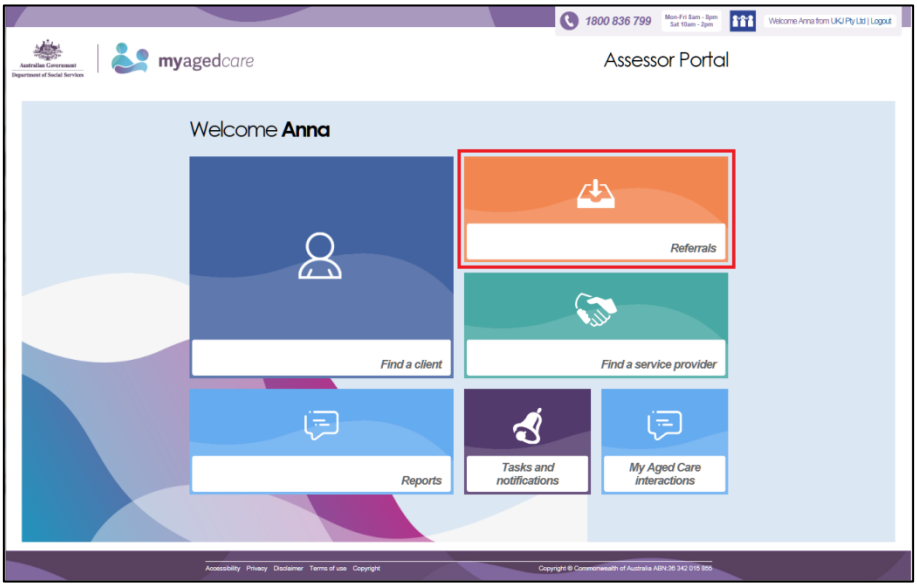


If you are searching for a particular referral, you can use ‘Find a client’ (selected from the homepage), by entering a first or last name. Alternatively, you can sort referrals by priority (high to low or low to high).

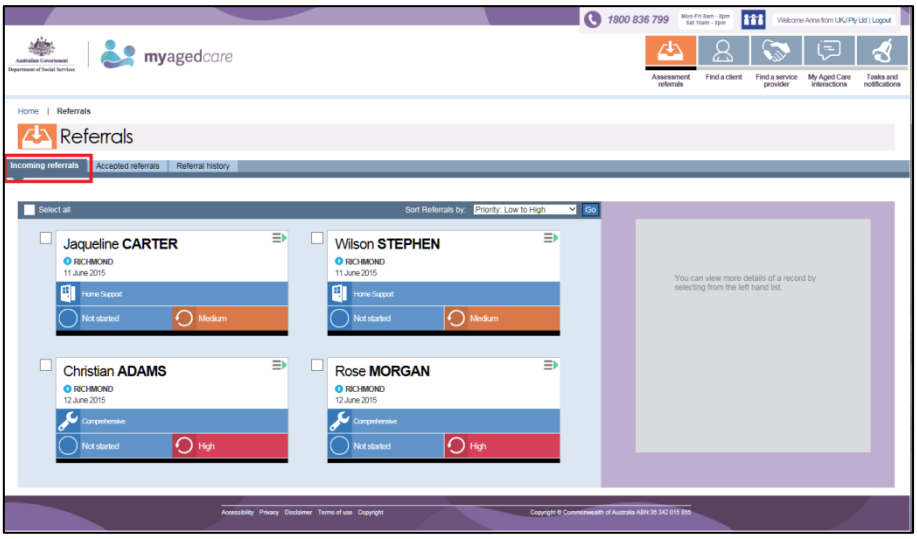
2.3 Accepting referrals

To accept referrals follow the steps below.

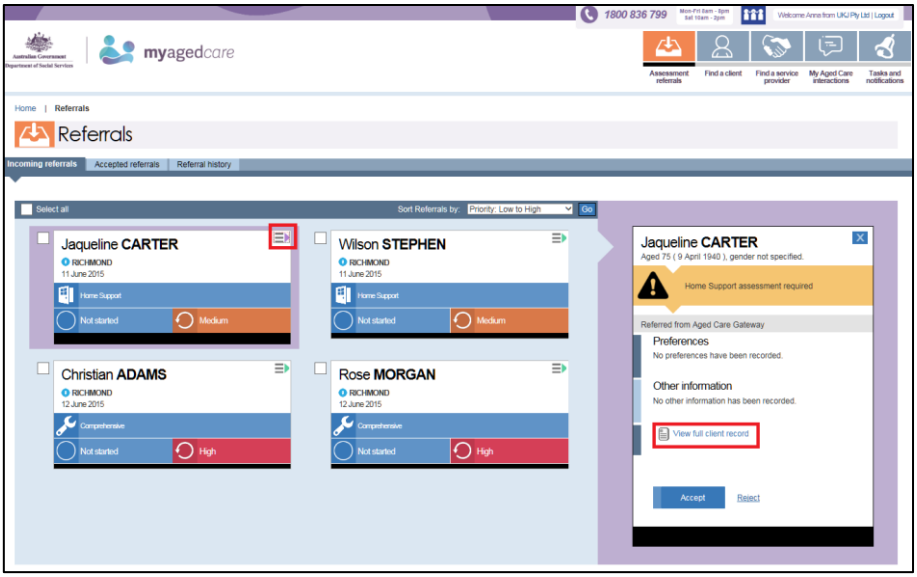
Step One: Select ‘Referrals’ on the homepage.



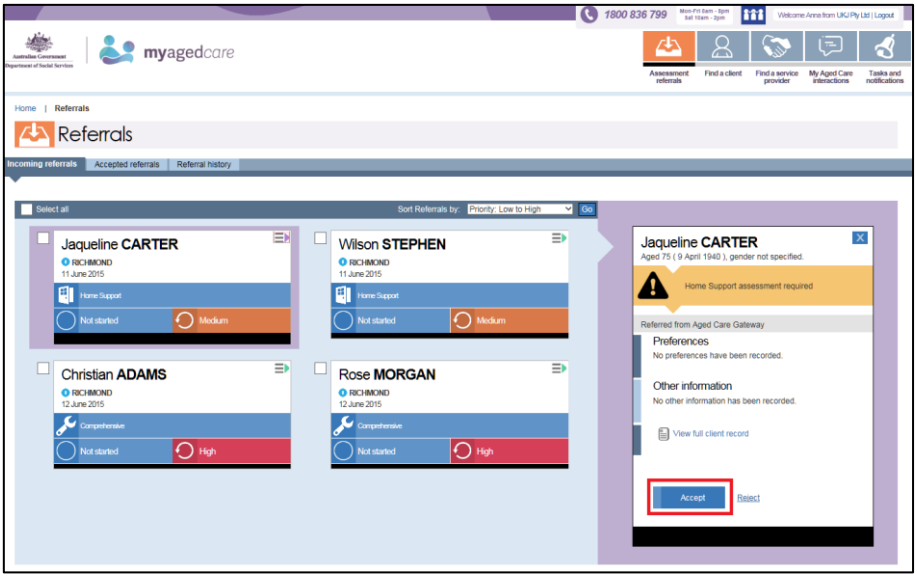
Step Two: Select ‘Incoming referrals’ to display the referrals that have been sent to the organisation that have not yet been actioned.



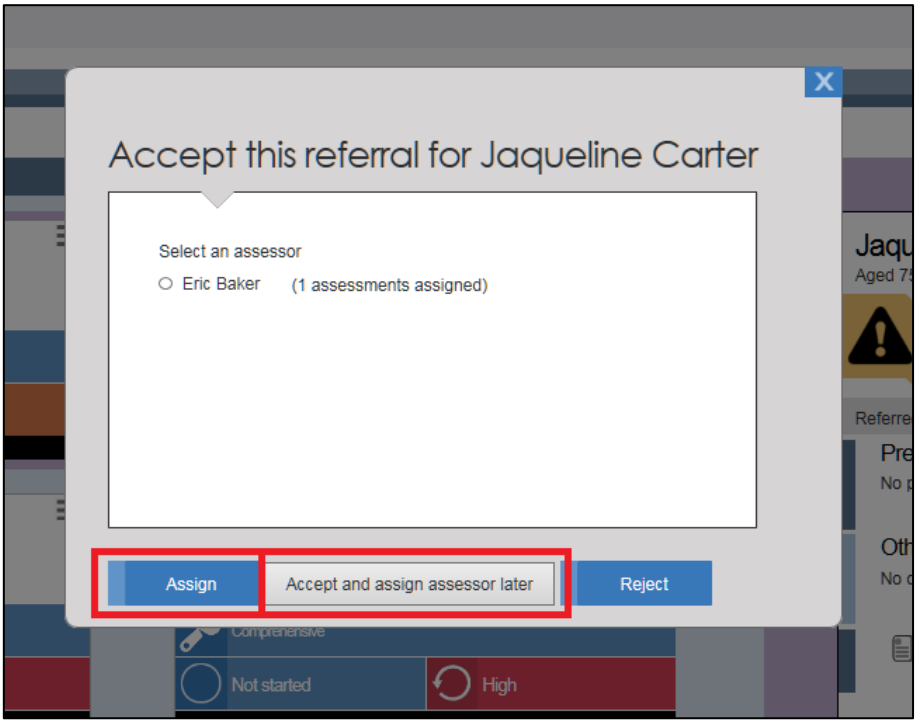
Step Three: Select the arrow on the 'Client card' you want to view. A summary of a client's information will be displayed on the right hand side of the page. To see more information, select 'View full client record'.



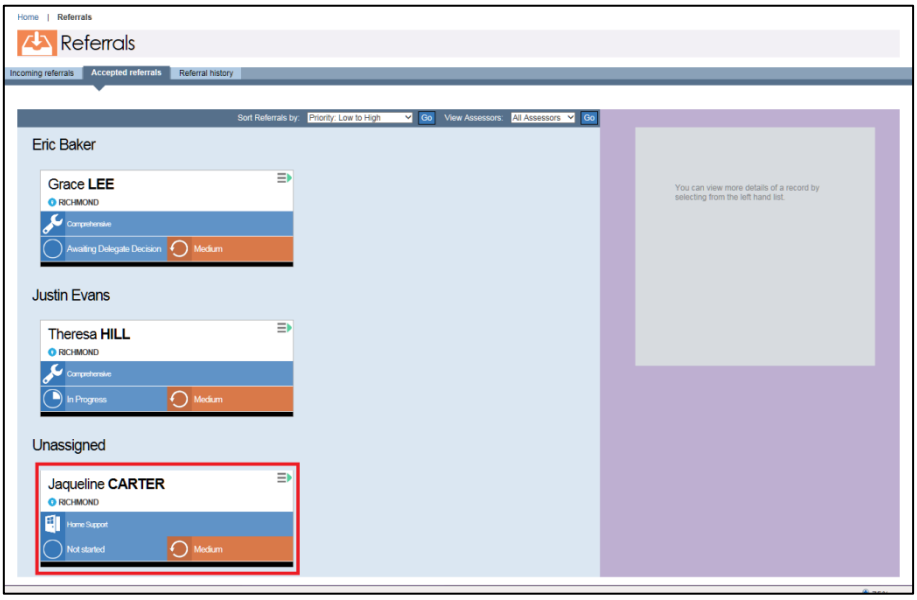
Step Four: To accept a referral, select 'Accept'.



Step Five: To assign the referral to an assessor, select ‘Assign’. If you want to accept and assign the referral to an assessor later, you can select ‘Accept and assign assessor later’.



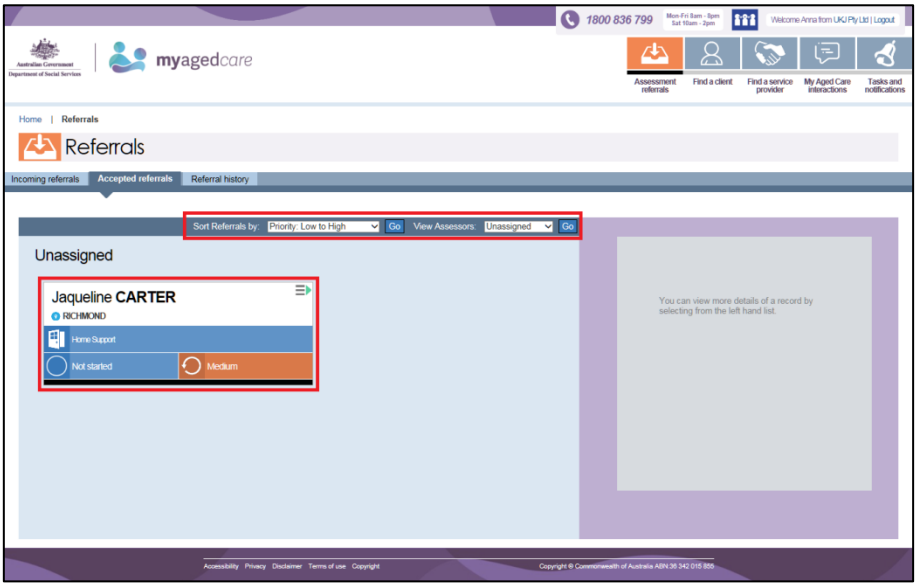
Step Six: The referral will appear in the ‘Accepted Referrals’ tab. If you assigned it to an assessor, it will appear in that assessor’s list of Referrals. If you selected ‘Accept and assign assessor later’ it will appear under ‘Unassigned’.



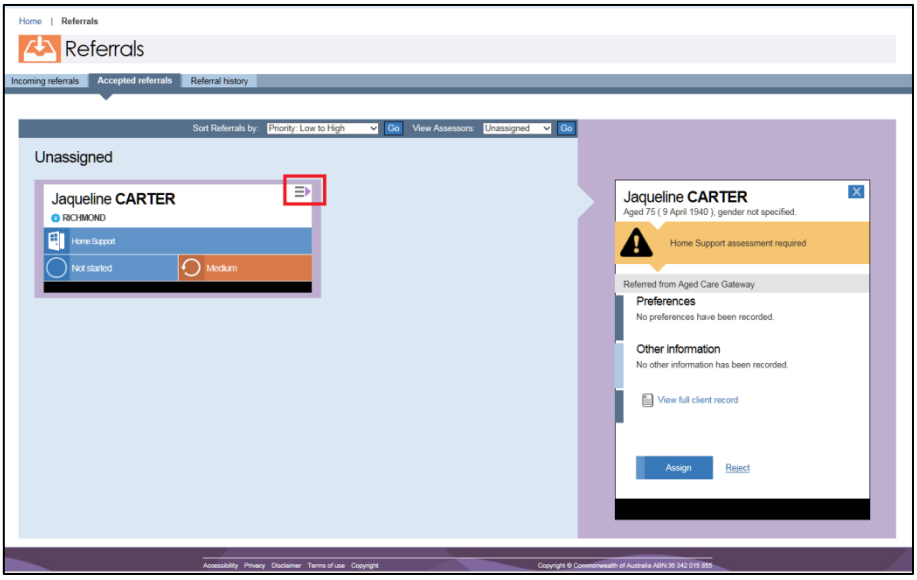
2.4 Assigning a referral to an Assessor

To assign a referral to an Assessor follow the steps below.

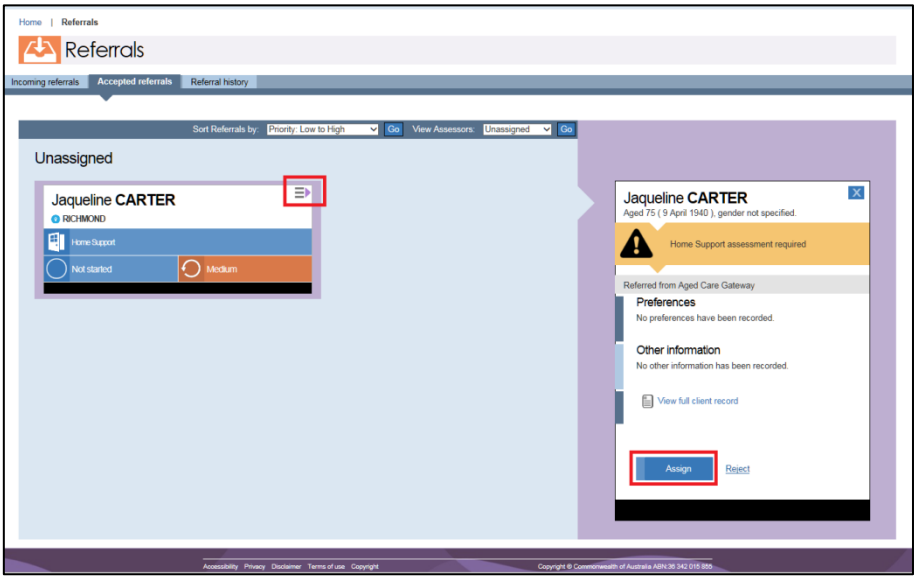
Step One: If you selected 'Accept and assign assessor later' (Step Five in Section 2.3) the referral will appear under 'Unassigned' in the 'Accepted Referrals' tab.



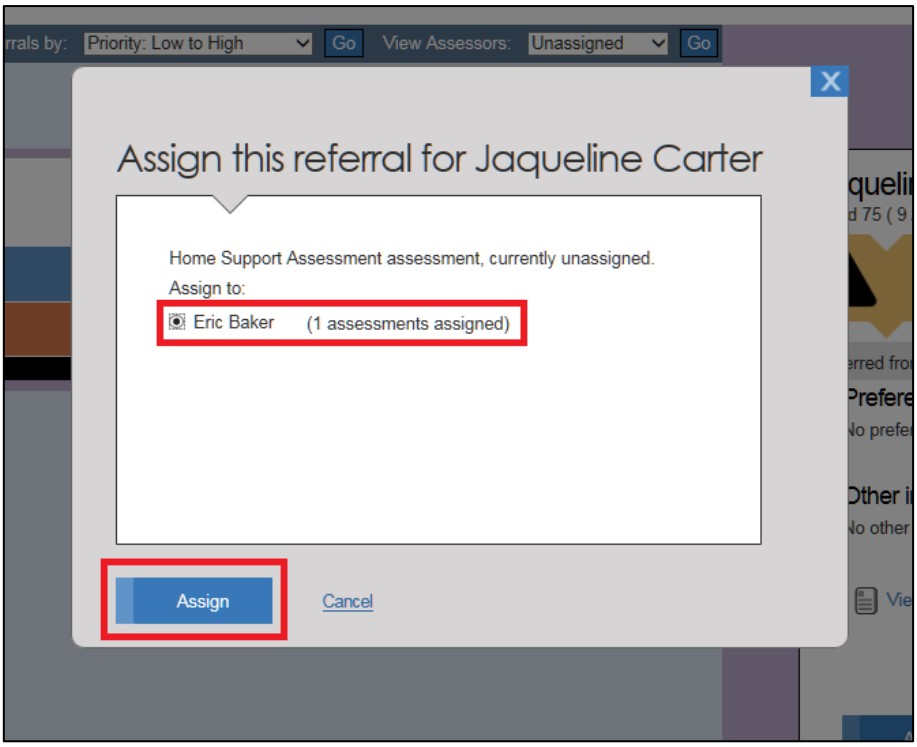
Step Two: To assign the referral to an Assessor, select the arrow on the 'Client card'. A summary of a client's information will be displayed on the right hand side of the page.



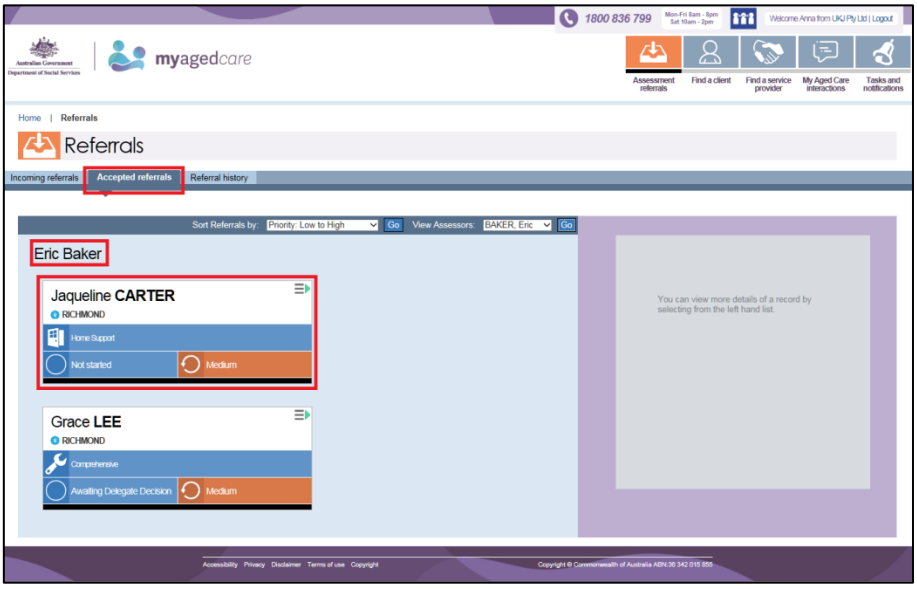
Step Three: Select ‘Assign’.



Step Four: A list of Assessors for your outlet will be displayed. Choose which Assessor you will assign the referral to, and select ‘Assign’.



Step Five: Once assigned, the Referral will appear in the Assessors' list of referrals.



2.5 Indicating that an assessment will be undertaken outside My Aged Care

From 1 July 2015, ACATs, and the Victorian HACC Assessment Service (Victorian HAS) will be accepting/rejecting referrals for assessment using the My Aged Care assessor portal.

The ACATs and Victorian HAS will need to follow the steps in Sections 2.4 and 2.5 to accept a referral and assign a referral to an assessor, and then follow the steps below to indicate that they will undertake the assessment in another system.

This means that the person(s) responsible for accepting/rejecting referrals will need to be assigned the Team Leader **AND** Assessor roles in the assessor portal. For the purposes of completing this action, the person does not need to perform assessor functions in the organisation or complete associated training.

It is critically important that ACATs, and Victorian HAS complete the steps below to 'close' the referral for assessment. If they do not, they will receive notifications and alerts to remind them to action all referrals for assessment received.

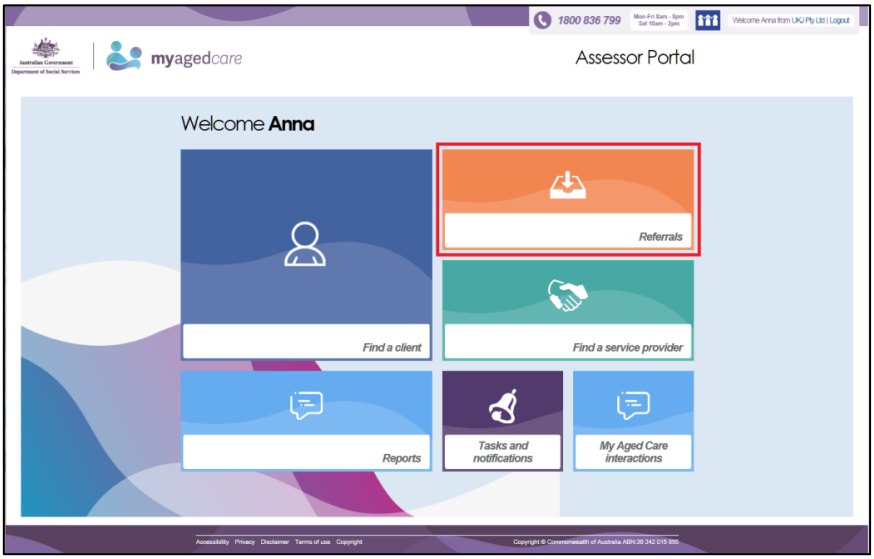
The 'Assess in other system' action **SHOULD ONLY** be undertaken by the:

- ACATs prior to fully transitioning to My Aged Care
- Victorian HAS prior to fully transitioning to My Aged Care.

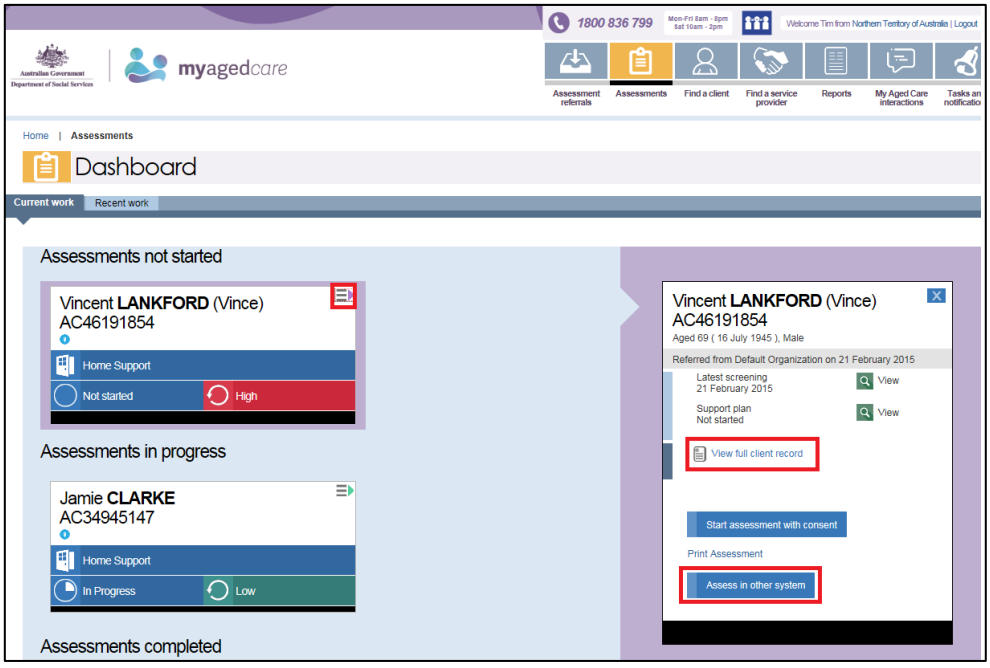
The RAS should **NOT** complete the 'Assess in other system' action.

To indicate that you are going to undertake the assessment in another system (i.e. you will not be completing the assessment via that My Aged Care assessor portal) follow the steps below.

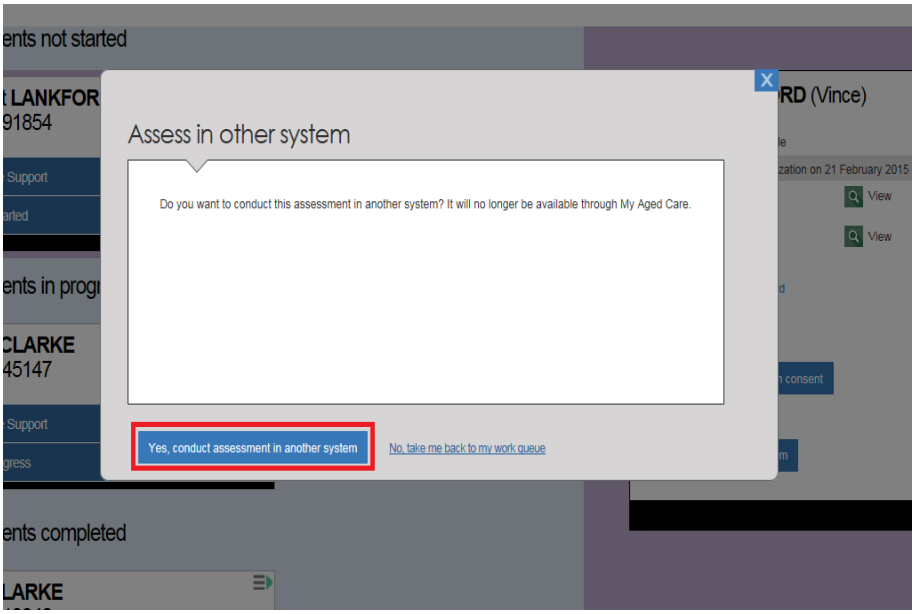
Step One: Select ‘Assessments’ on the homepage.



Step Two: From the Assessments page, you will be able to ‘View full client record’ (which will contain information collected at screening). To indicate that you will undertake the assessment in another system, select ‘Assess in other system.’



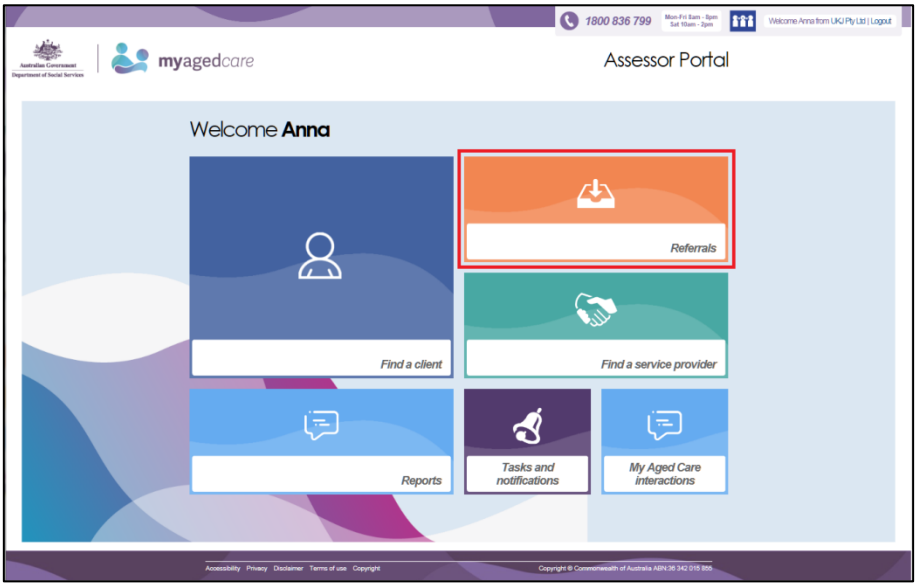
Step Three: Confirm that you want to conduct the assessment in another system. The assessment will no longer be available through My Aged Care.



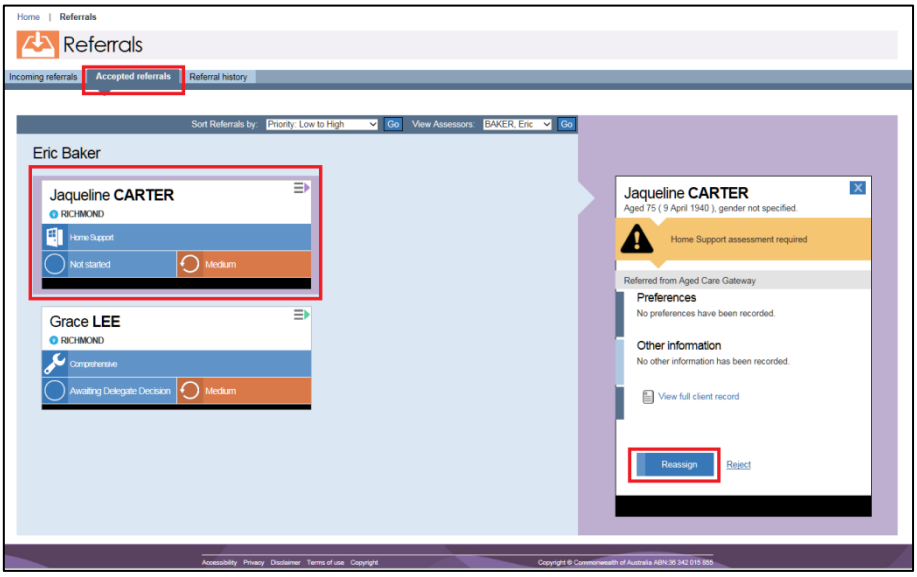
2.6 Reassigning or Unassigning referrals

Once a referral has been accepted and assigned to an Assessor, you may reassign it to another Assessor. To reassign or unassign referrals follow the steps below.

Step One: Select 'Referrals' from the homepage.

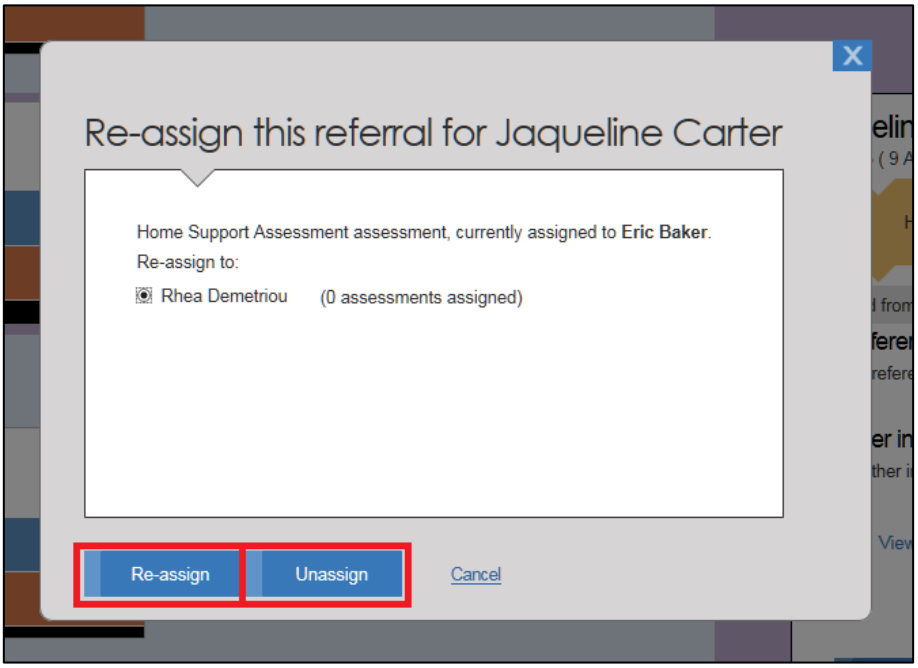


Step Two: Select 'Accepted referrals' to display the referrals that have been accepted. To reassign or unassign the referral to another Assessor, select the arrow on the 'Client card'. A summary of a client's information will be displayed on the right hand side of the page. Select 'Reassign'.

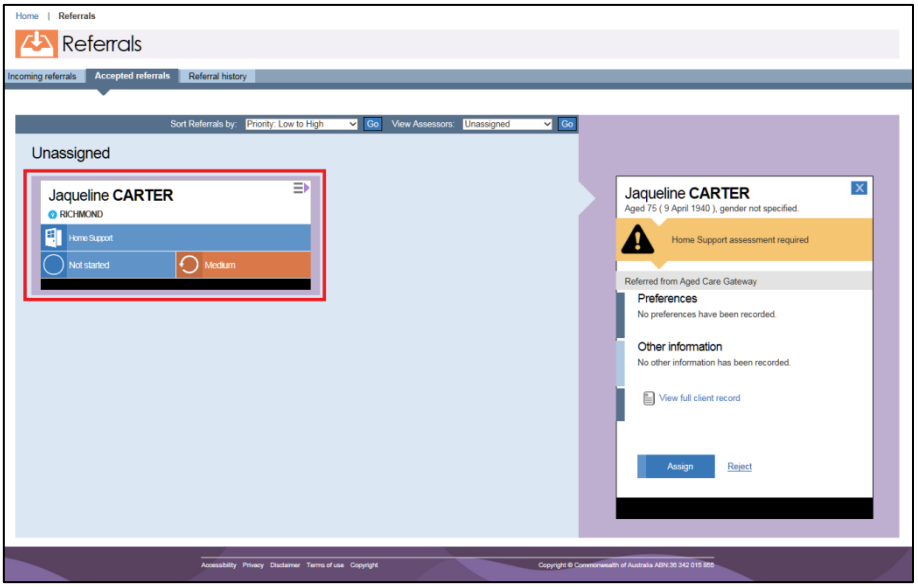


To assign the referral to another Assessor, select the appropriate person from the list displayed and select 'Re-assign'.

To unassign the referral (i.e. have no Assessor assigned to the referral), select ‘Unassign’.



Step Three: Once reassigned, the referral will appear in the selected Assessors’ list of referrals. If unassigned, the referral will appear under ‘Unassigned’ in the ‘Accepted Referrals’ queue.

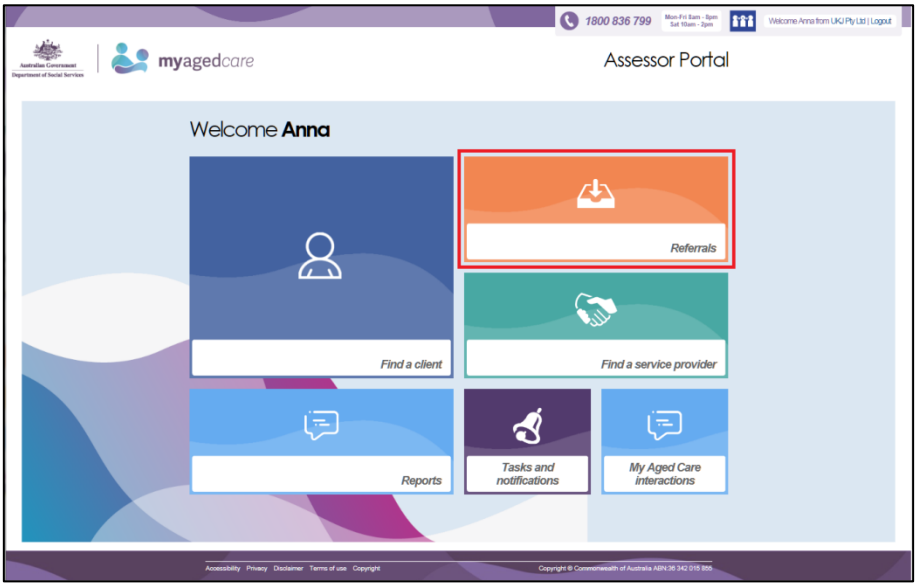


2.7 Rejecting a referral

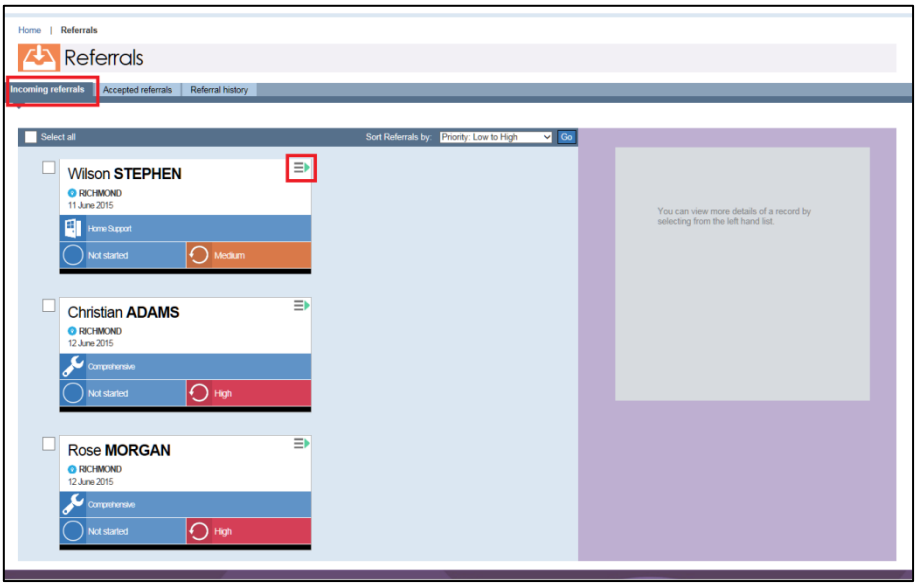
If you are unable to accept a referral, you can reject the referral.

To reject a referral follow the steps below.

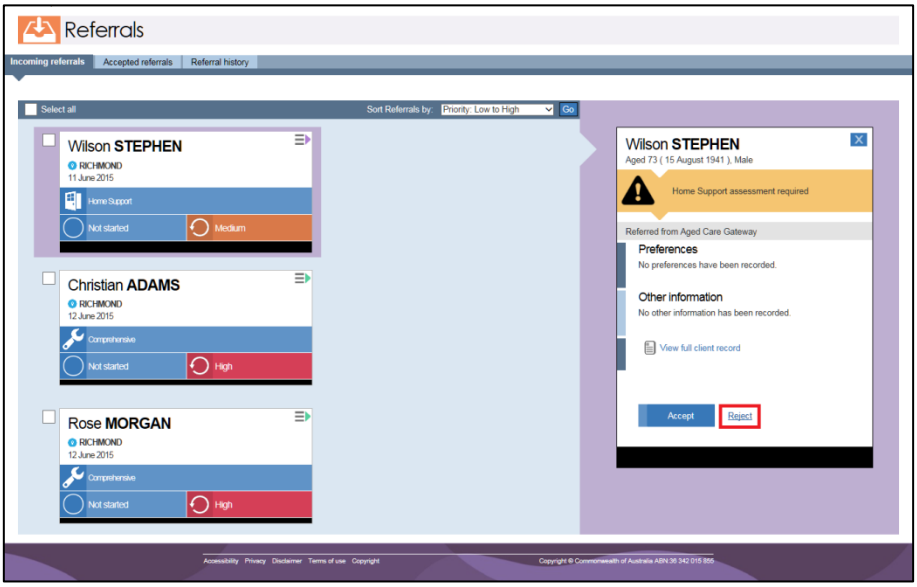
Step One: From the homepage, select ‘Referrals’.



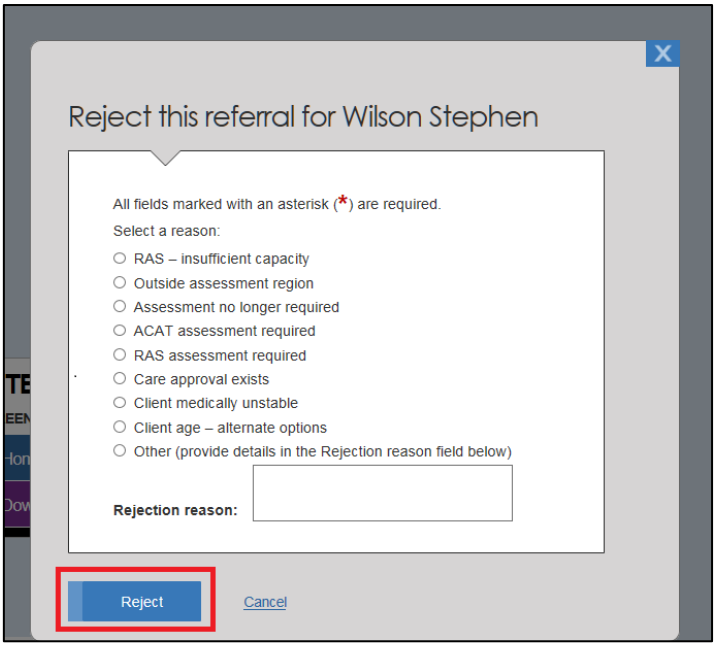
Step Two: Select ‘Incoming referrals’ to display the referrals that have been received. Select the arrow on the ‘Client card’. A summary of the client’s information will be displayed on the right hand side of the page.



Step Three: To reject the referral, select 'Reject'.



Step Four: Select the 'Reason for rejection' of the referral from the list displayed, then select 'Reject'. If you select 'Other', a free text box will allow you to record the reason.



Referrals can be rejected after they have been accepted only where the assessment has not yet been started.

Assessor

3 Assessor role

The Assessor role enables appropriately accredited staff to use the assessor portal to view client records assigned to them, register clients and representatives, complete an identity verification check, undertake assessments using the National Screening and Assessment Form (NSAF), and send referrals for service(s).

People who perform a Delegate role will need to be assigned the Delegate role as well as the Assessor role in the assessor portal.

RAS and ACATs will use the NSAF via the assessor portal (or the myAssessor app or printed version of the NSAF) to undertake assessments. The NSAF User Guide provides an outline of the principles that underpin the NSAF, and guidance about how to use the NSAF to conduct an assessment. The NSAF User Guide is available on dss.gov.au/MyAgedCare.

This section steps you through how to:

- Find a client and view a client record
- Attach a document
- Send information to a client
- Register a client/representative
- Complete identity verification
- Conduct assessment (and create support plan)
- Send referrals for service(s).

For more information about the client record, registering a client and representative and the support plan see Guidance for Assessors and the National Screening and Assessment Form User Guide available at dss.gov.au/MyAgedCare.

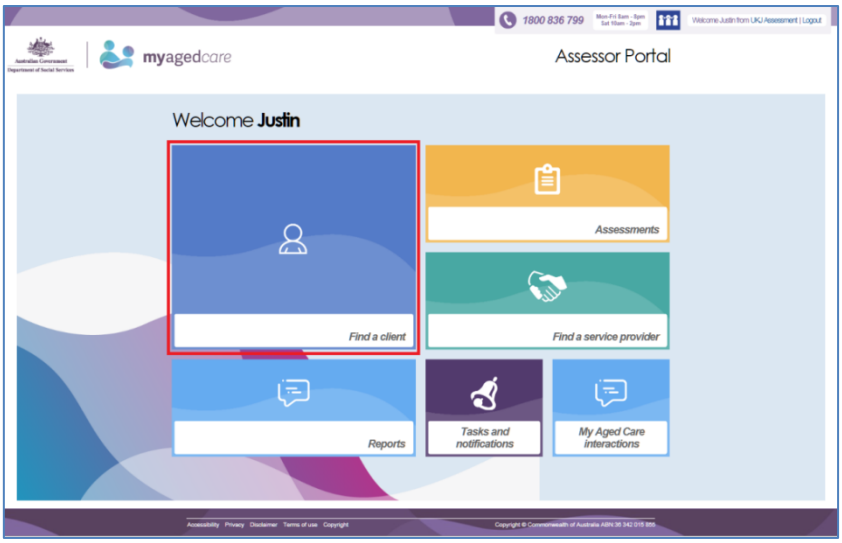
3.1 Finding a client and viewing the client record

The client record contains tabs with the following information:

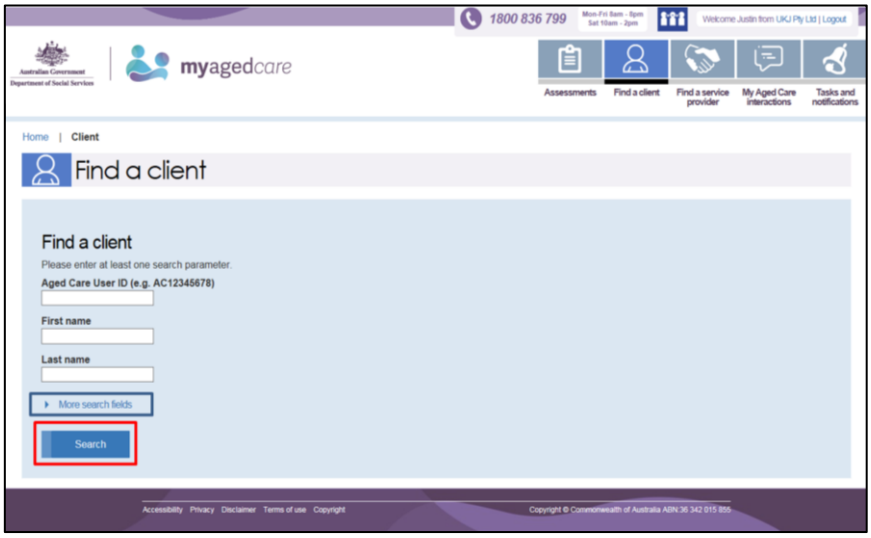
- Client details
- Approvals
- Plans
- Attachments
- Services
- Interactions.

To find a client and view their client record follow the steps below.

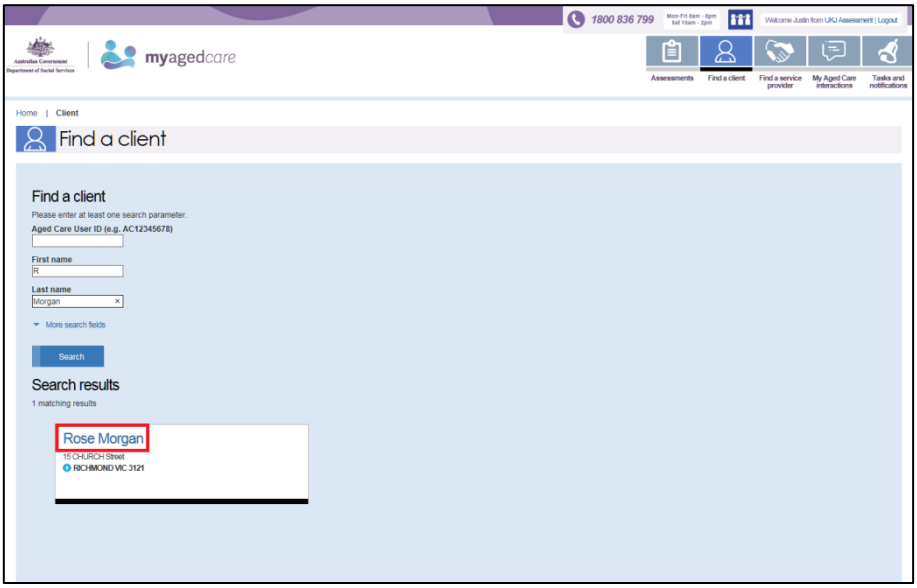
Step One: From the homepage, select 'Find a Client'.



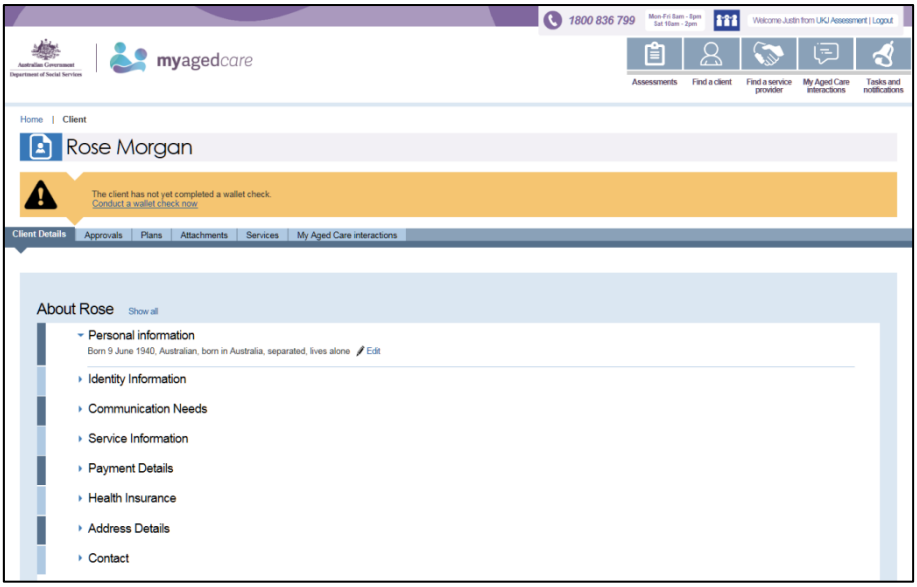
Step Two: You can undertake a basic search for the client by entering their first name, last name or Aged Care User ID and select 'Search'. To display more search fields, you can select 'More Search Fields'.



Step Three: Matching search results will be displayed. Select the name of the client you are searching for.



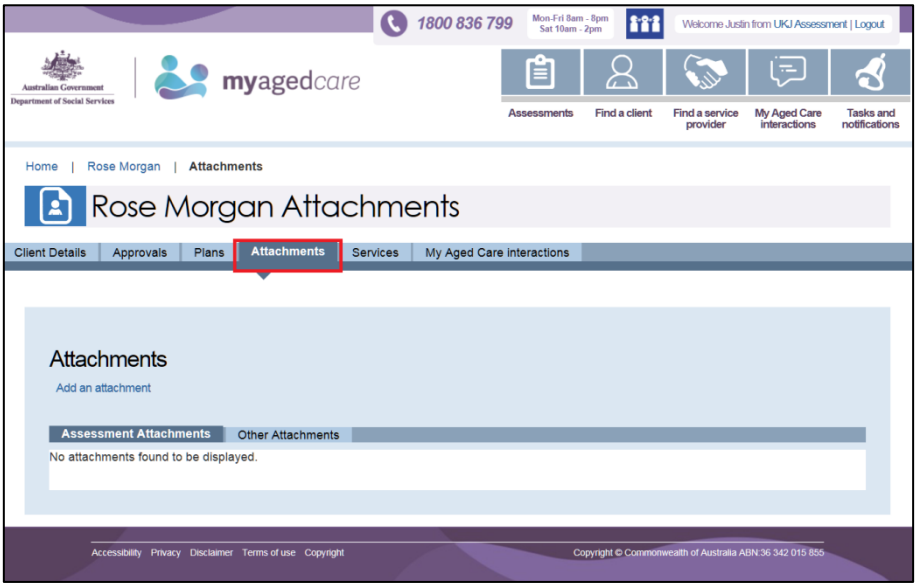
Step Four: This will display a client's information for you to view.



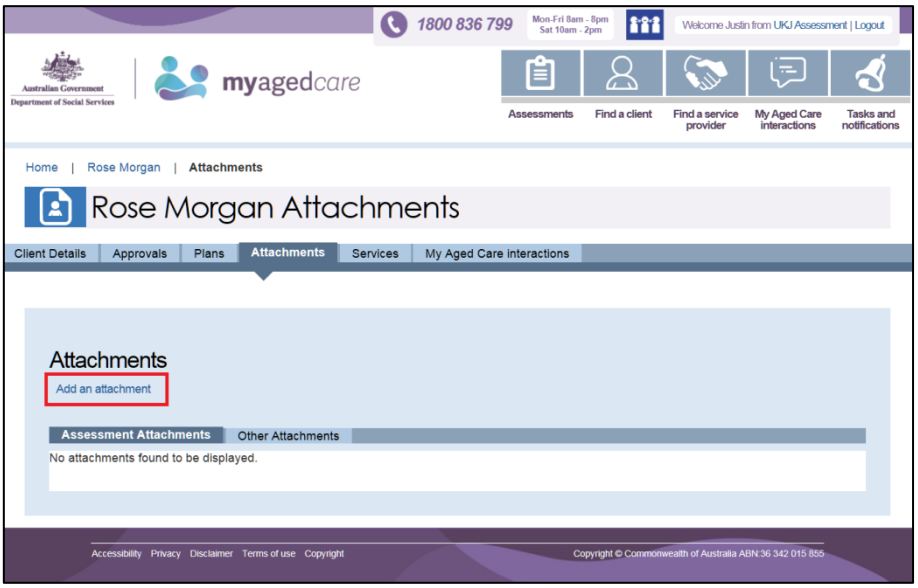
3.2 Attaching a document

To attach a document to the client record, follow the steps in Section 3.1 to find the client, and then follow the steps below.

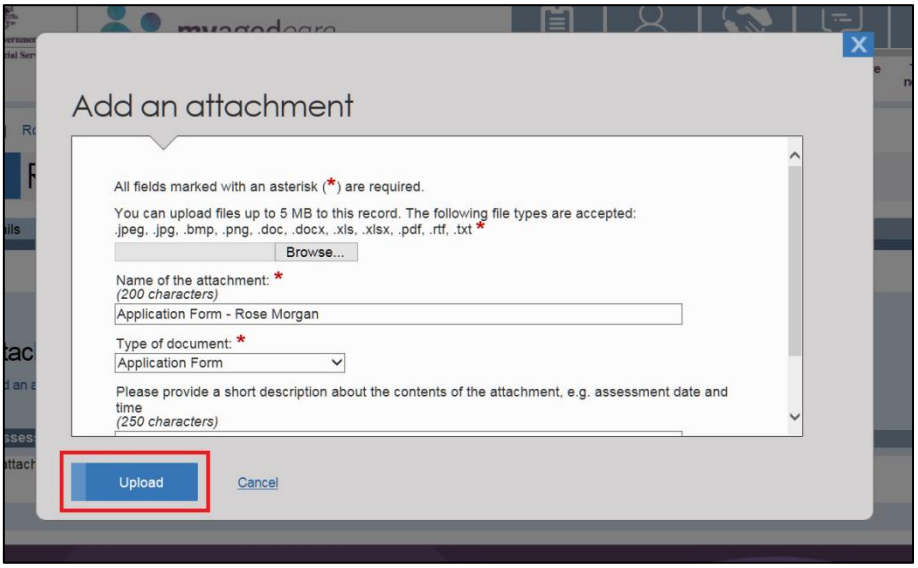
Step One: Select 'Attachments'.



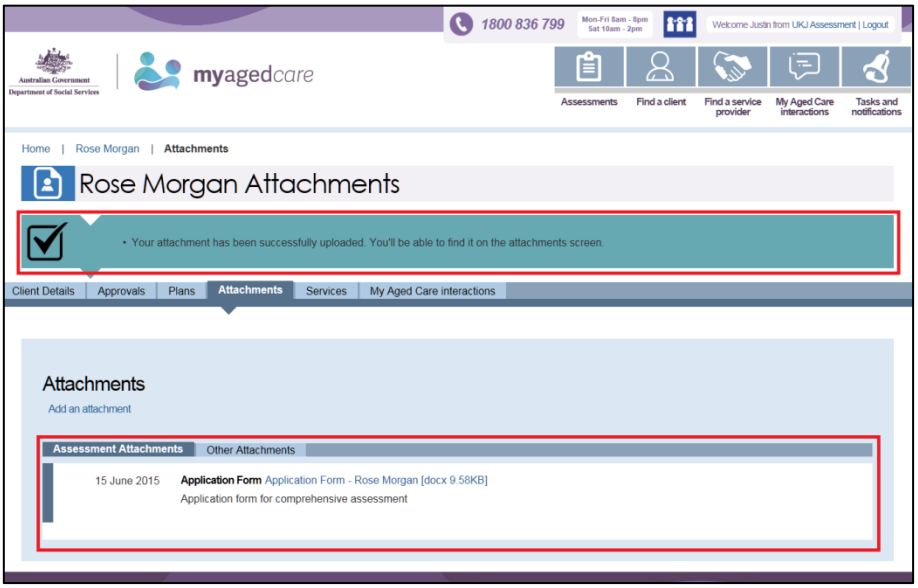
Step Two: Select 'Add an Attachment'.



Step Three: Add the attachment by selecting 'Browse'. Add required information, including name of the attachment and type of document. Select 'Upload'.


Add an attachment
All fields marked with an asterisk (*) are required.
You can upload files up to 5 MB to this record. The following file types are accepted:
.jpeg, .jpg, .bmp, .png, .doc, .docx, .xls, .xlsx, .pdf, .rtf, .txt *
Browse...
Name of the attachment: *
(200 characters)
Application Form - Rose Morgan
Type of document: *
Application Form
Please provide a short description about the contents of the attachment, e.g. assessment date and time
(250 characters)
Upload
Cancel

Step Four: You will receive a confirmation message informing you that the document has been attached. Depending on the type of document attached, it will display in either the 'Assessment Attachments' tab or 'Other Attachments' tab.



3.3 Registering a client or representative

An Assessor should encourage people to contact the My Aged Care contact centre to register and be screened prior to commencing an assessment.

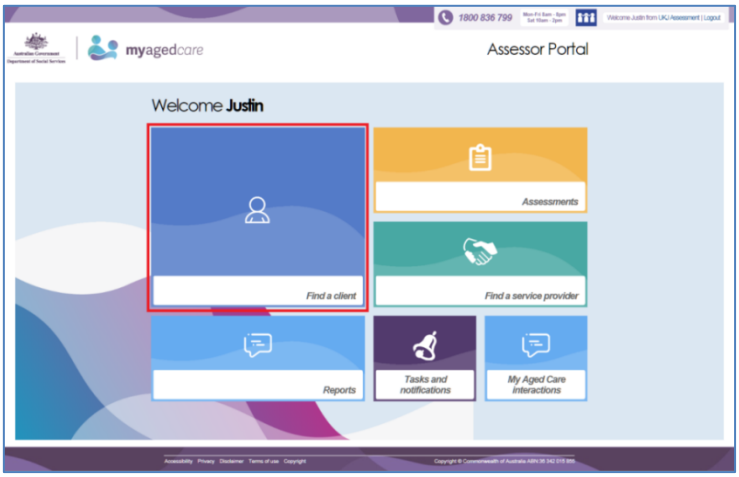
In cases where urgent care is required, you may register the person with My Aged Care and undertake an assessment.

> You must have the client's consent to complete registration.

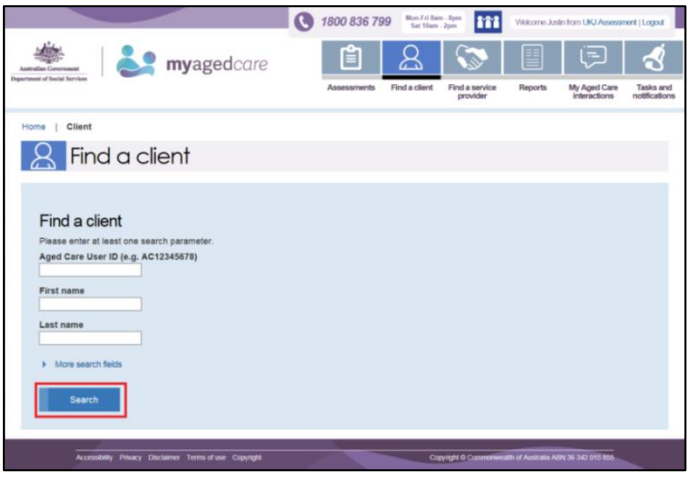
3.3.1 Registering a client

You will only be able to register a client when you can confirm that there is no client record for the client. To see whether the client has a My Aged Care client record, and register a client, follow the steps below.

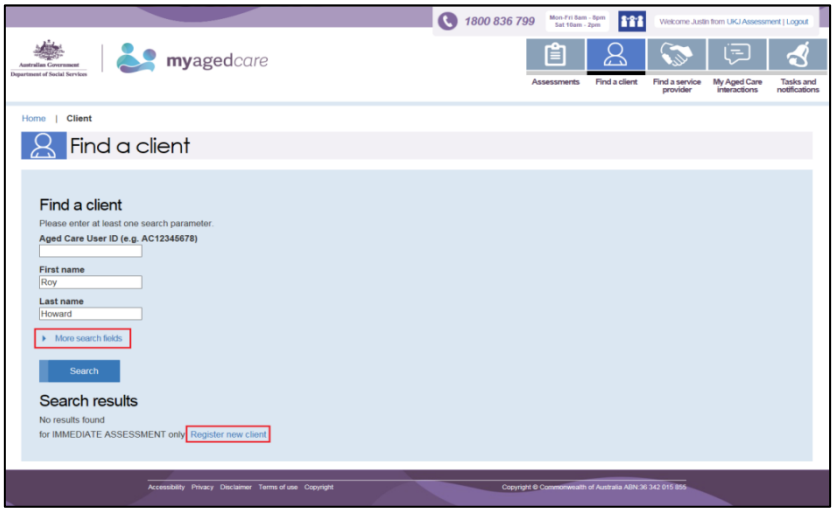
Step One: From the homepage, select 'Find a Client'.



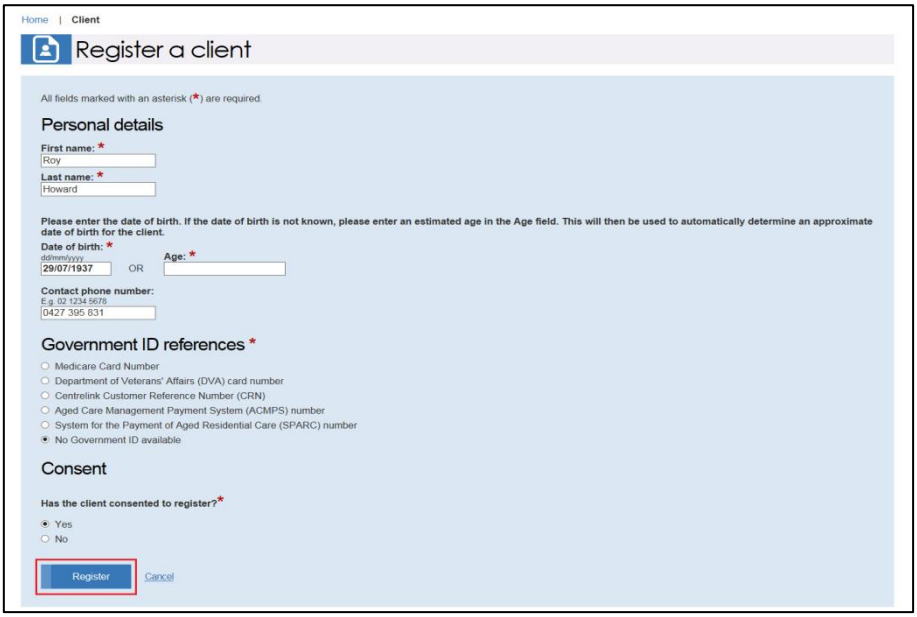
Step Two: Enter either the client's first name or last name. You only need to enter information into one search field, and select 'Search'. Matching search results will be displayed.



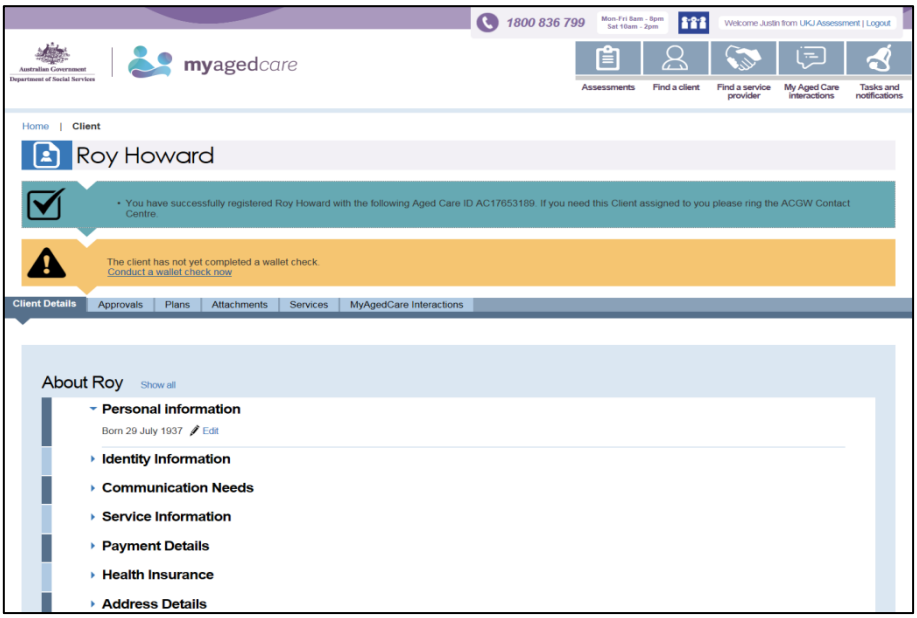
Step Three: If there is no client record, select ‘Register new client’.



Step Four: Enter the required details and select ‘Register’.


Home | Client
Register a client
All fields marked with an asterisk (*) are required.
Personal details
First name: *
Roy
Last name: *
Howard
Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the client.
Date of birth: *
dd/mm/yyyy
29/07/1937
OR
Age: *
Contact phone number:
E.g. 02 1234 5678
0427 395 831
Government ID references *
Medicare Card Number
Department of Veterans' Affairs (DVA) card number
Centrelink Customer Reference Number (CRN)
Aged Care Management Payment System (ACMPS) number
System for the Payment of Aged Residential Care (SPARC) number
No Government ID available
Consent
Has the client consented to register?*
Yes
No
Register
Cancel

Step Five: You will receive a confirmation message that registration has been successful. You will be directed to the 'Client Details' page to enter further information.



If you have registered a client and need to conduct an assessment for that client, you will need to contact the My Aged Care contact centre to have a referral issued to your assessment organisation.

3.3.2 Registering a representative

An Assessor should encourage representatives to contact the My Aged Care contact centre to register. An Assessor has the ability to register a representative (regular or authorised) via the assessor portal, where required. Further information is available in Guidance for Assessors.

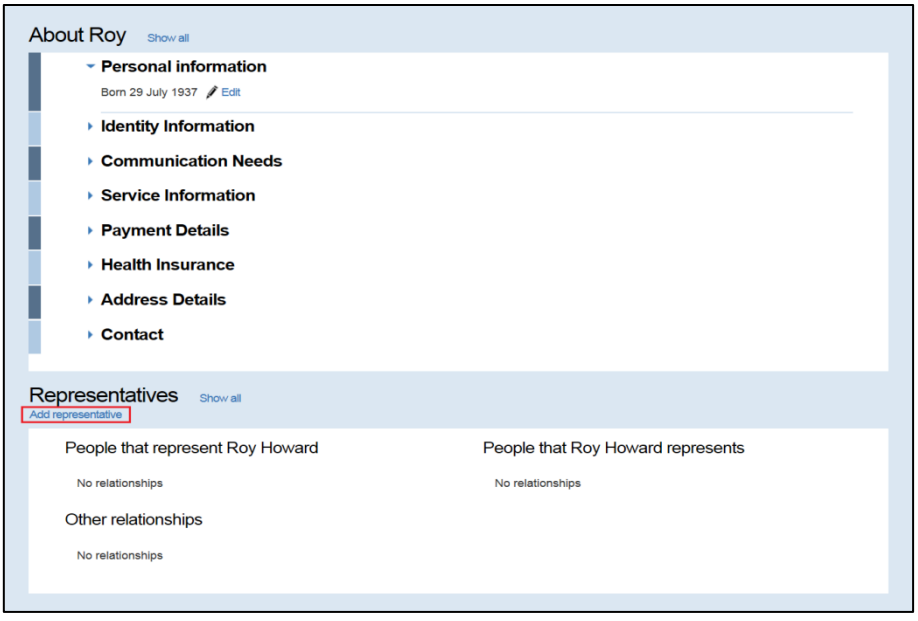
When creating an authorised representative for a client, you must scan and attach their documentary evidence of authority, where it is applicable.

Attachments relating to the authority of an authorised representative such as Power of Attorney documentation should be attached to the representative's record, not to the client's record.

To register a representative, follow the steps below.

Step One: From the client's record (follow the steps in Section 3.1 to find the client), select 'Client Details'. Information about representatives is at the bottom of the 'Client Details' page.

Step Two: View representative(s) information and confirm representative has not already been established/linked to the client record. Select 'Add representative'.

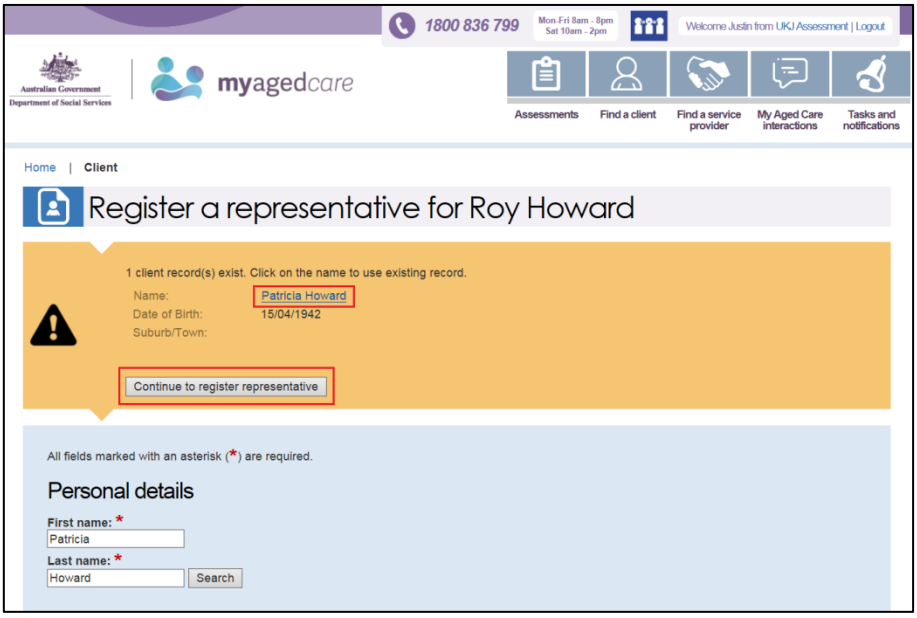


Step Three: Enter the first name or last name of the representative to see whether they are already in the system. Select 'Search.

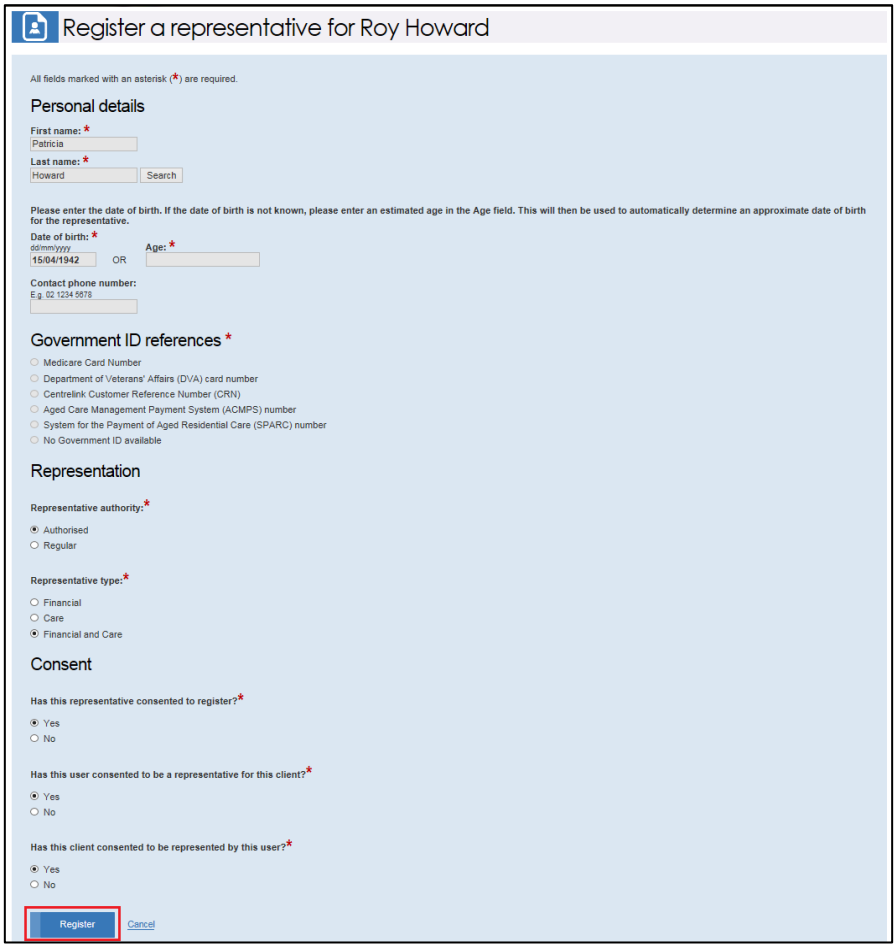
Step Four: Where matching records are found, they will be displayed at the top of the page.

If the person found is the correct representative to be added, select the person's name to use existing record.

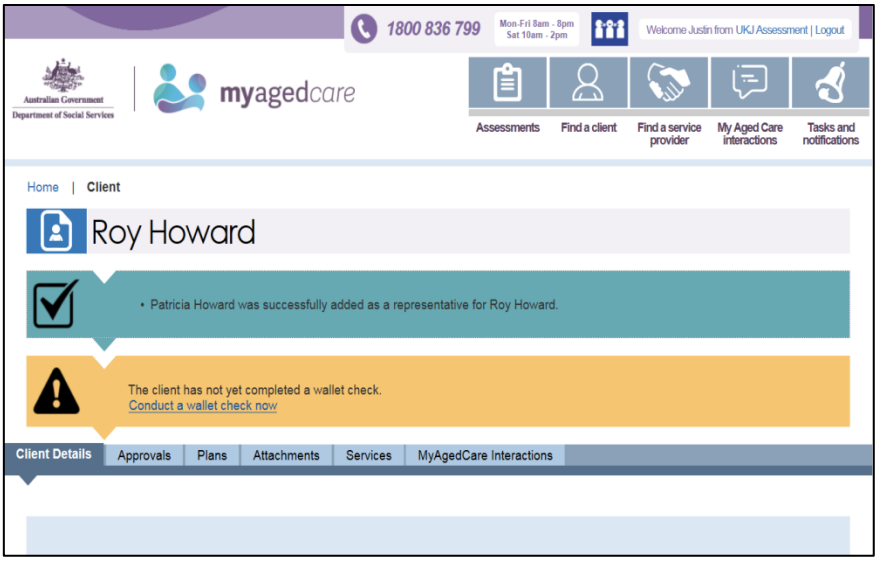
If the person you have searched for is not listed in the search results or no matches are found, select 'Continue to register representative' and enter the required representative details.



Step Five: Enter information in each of the mandatory fields (include consents). When complete, select 'Register'.



Step Six: Once the representative has been added, they will appear on the 'Client details' tab.



When creating an authorised representative for a client, you must scan and attach their documentary evidence of authority, where it is applicable.

Attachments relating to the authority of an authorised representative such as Power of Attorney documentation must be attached to the representative's record, not to the client's record.

3.4 Completing identity verification

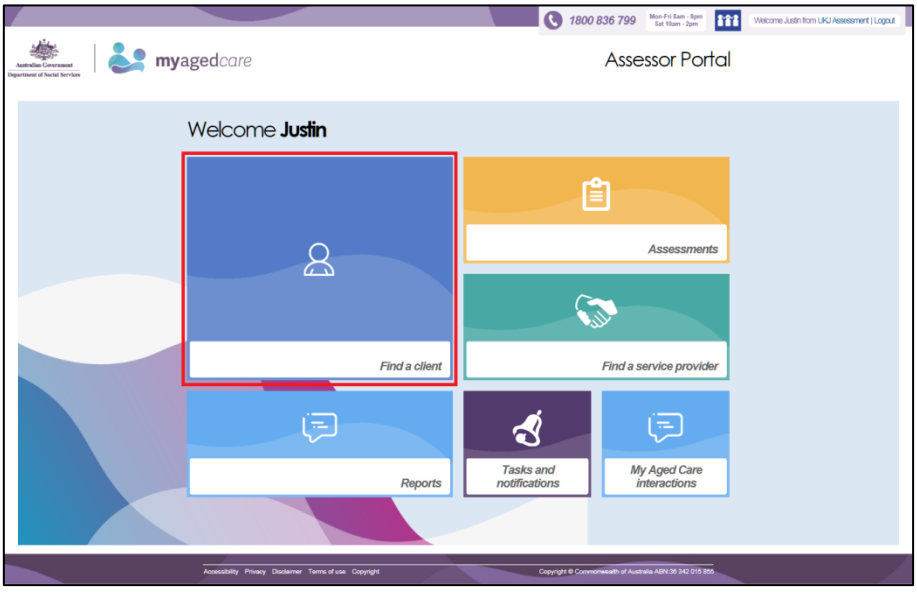
The identity verification process is a two-step process. The first step occurs during registration, where client information is verified against records held at the Department of Human Services. This aims to ensure that duplicate client records are not created.

Assessors (and service providers) are required to complete the second step of the process by conducting a 'wallet check'. To complete the identity verification process, Assessors or service providers will ask to sight **two** client identification documents. This process only needs to occur once.

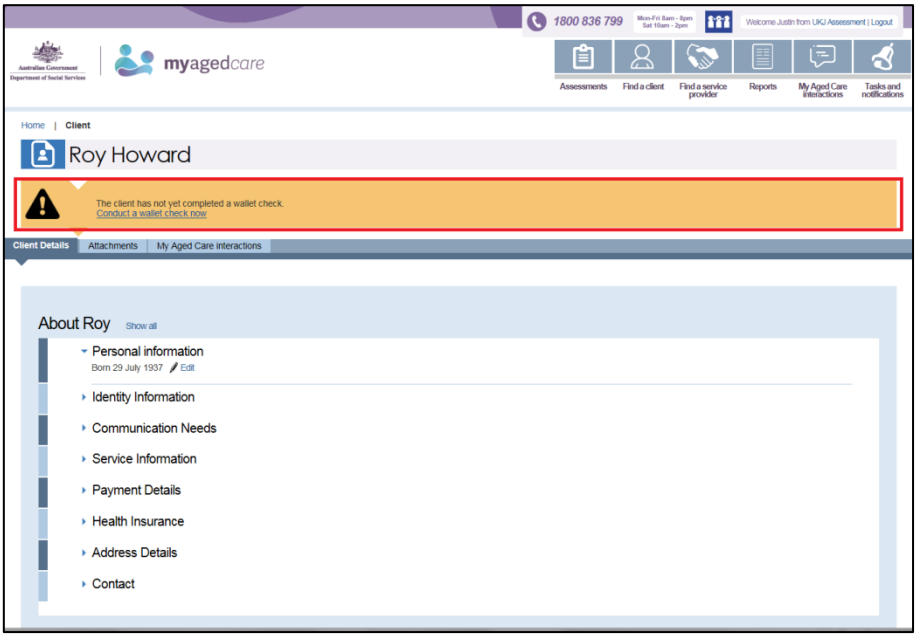
> It is expected that whoever has face-to-face contact with the client in the first instance (i.e. an Assessor or service provider) will sight the client identification and record this information on the client record.

To conduct a wallet check, follow the steps below.

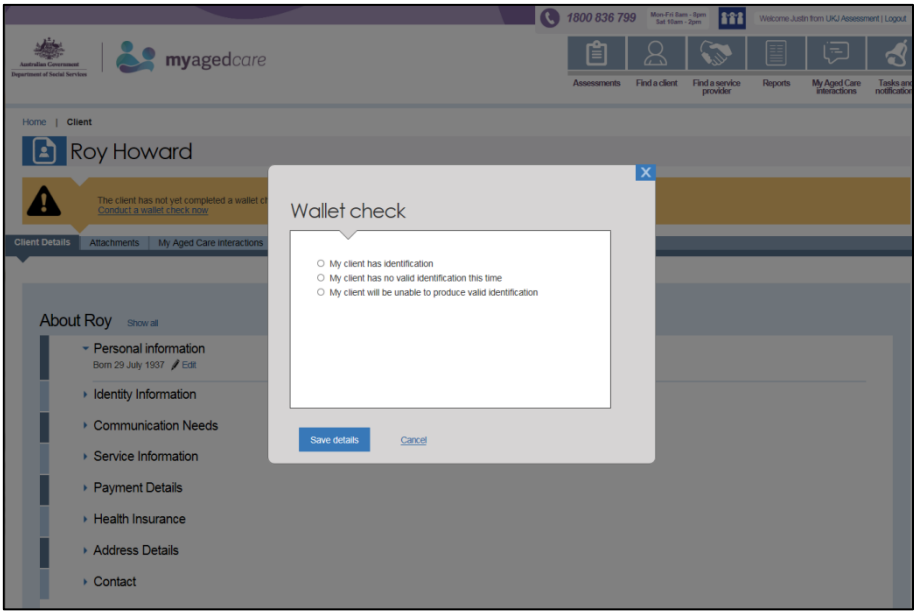
Step One: From the homepage, select 'Find a client'.



Step Two: A notification will be displayed at the top of the client record if you need to conduct a 'wallet check'. Select 'Conduct a wallet check now'.



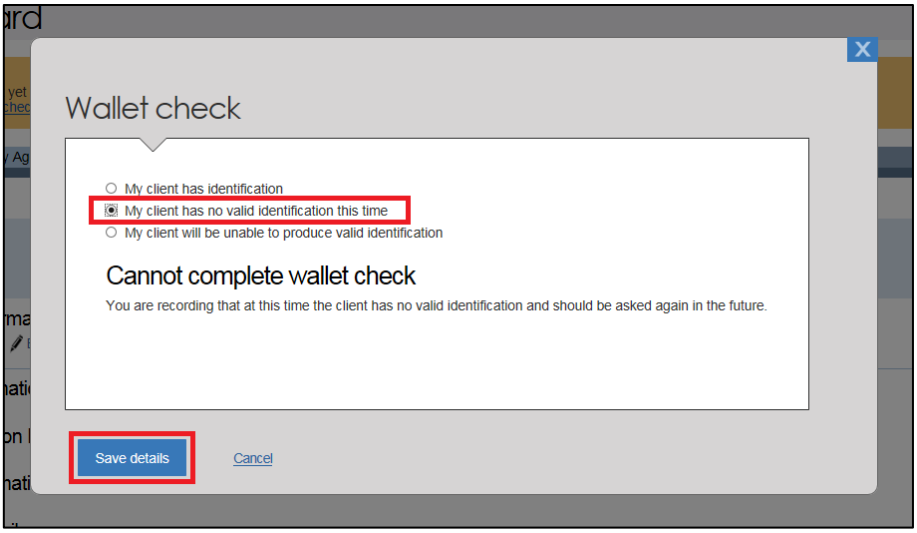
Step Three: A page is displayed to record whether the client has identification that will allow you to complete the process.



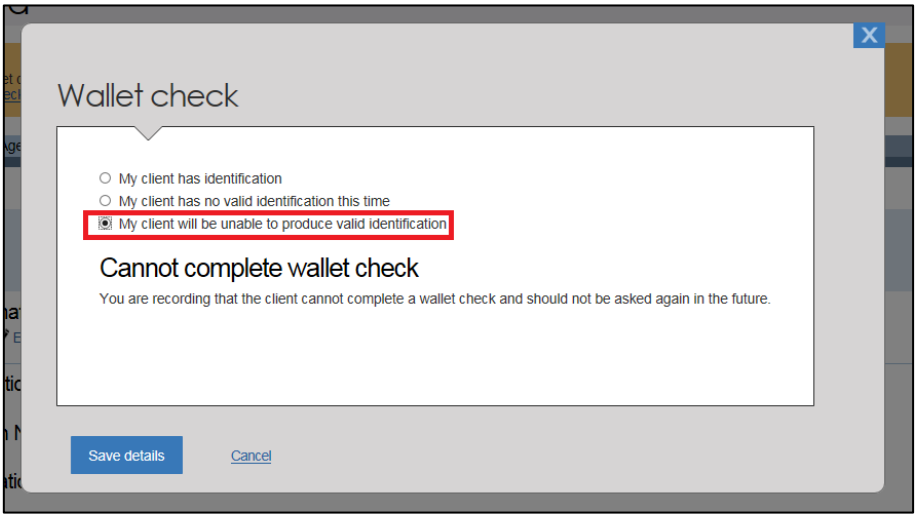
If you have selected 'My client has identification', go to **Step Four**.

If you have selected 'My client has no valid identification this time' because the client is unable to produce the required identification during your contact with them, you will receive a message confirming that a wallet check should be completed at a later date.

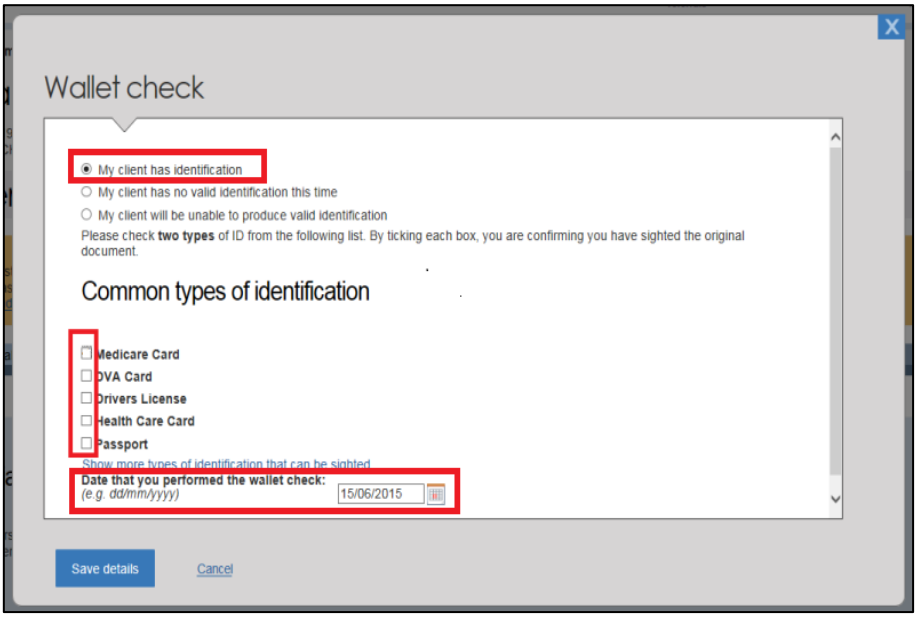
The reminder to complete a wallet check will remained displayed until the time a wallet check can be completed or it becomes clear that the client cannot produce any valid identity documents. Proceed to **Step Five**.


Wallet check
My client has identification
My client has no valid identification this time
My client will be unable to produce valid identification
Cannot complete wallet check
You are recording that at this time the client has no valid identification and should be asked again in the future.
Save details
Cancel

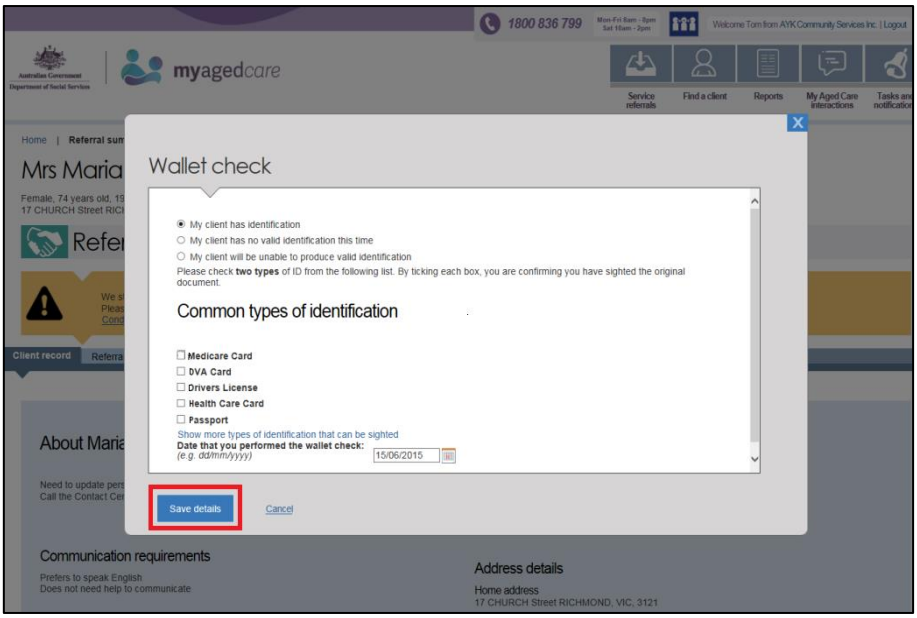
If you have selected 'My client will be unable to produce valid identification', a message will be displayed to record that you are unable to complete the wallet check and that it will not be able to be completed at a future date. Proceed to **Step Five**.


Wallet check
My client has identification
My client has no valid identification this time
My client will be unable to produce valid identification
Cannot complete wallet check
You are recording that the client cannot complete a wallet check and should not be asked again in the future.
Save details
Cancel

Step Four: The page will be expanded to allow you to record the type of documentation sighted, and the date that you performed the wallet check.


Wallet check
My client has identification
My client has no valid identification this time
My client will be unable to produce valid identification
Please check two types of ID from the following list. By ticking each box, you are confirming you have sighted the original document.
Common types of identification
Medicare Card
DVA Card
Drivers License
Health Care Card
Passport
Show more types of identification that can be sighted
Date that you performed the wallet check:
(e.g. dd/mm/yyyy)
15/06/2015
Save details
Cancel

Step Five: Select 'Save details'. This information will be updated on the client record.


1800 836 799
myagedcare
Wallet check
My client has identification
My client has no valid identification this time
My client will be unable to produce valid identification
Please check two types of ID from the following list. By ticking each box, you are confirming you have sighted the original document.
Common types of identification
Medicare Card
DVA Card
Drivers License
Health Care Card
Passport
Show more types of identification that can be sighted
Date that you performed the wallet check:
(e.g. dd/mm/yyyy)
15/06/2015
Save details
Cancel
Communication requirements
Address details

3.5 Conducting an assessment

The process of conducting an assessment via the assessor portal is similar for both home support assessment and comprehensive assessment. The Delegation process (A recommendation sent by a comprehensive assessor to a Delegate for approval for services under the *Aged Care Act 1997* (the Act)) is detailed in Section 4.

3.5.1 Options for conducting assessments

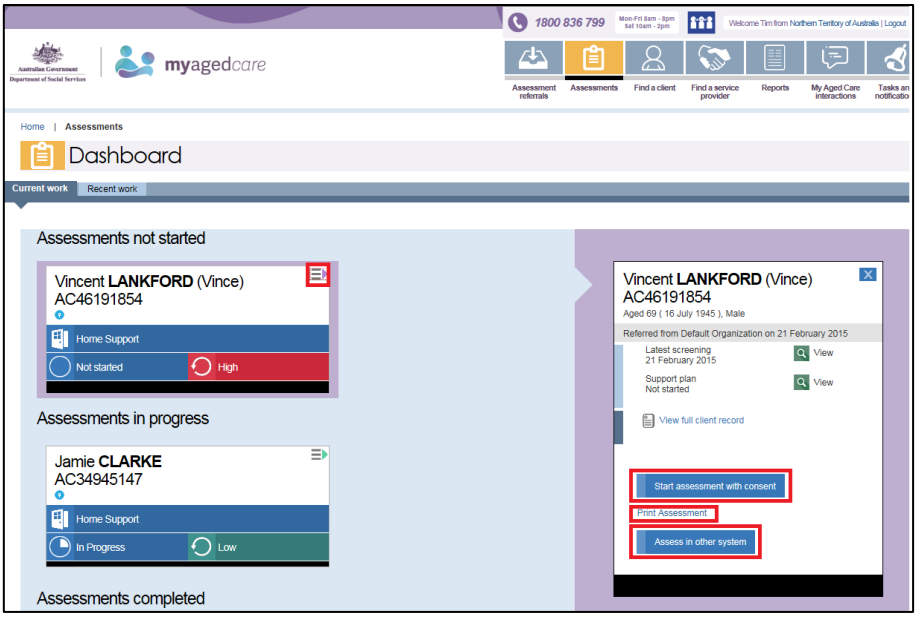
Assessors can conduct assessments via:

- The assessor portal
- The myAssessor app, and upload information in to the assessor portal when the assessor next has internet connectivity (see **Attachment C** for further information)
- A printed copy of the NSAF, and enter information in the assessor portal after the assessment has been undertaken.

The 'Assess in other system' action **SHOULD ONLY** be undertaken by the:

- ACATs prior to fully transitioning to My Aged Care
- Victorian HAS prior to fully transitioning to My Aged Care.

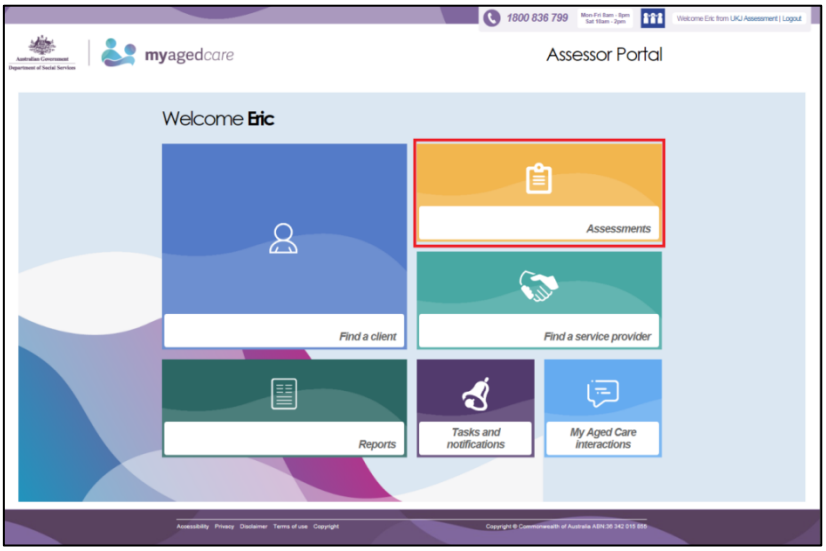
The RAS should **NOT** complete the 'Assess in other system' action.



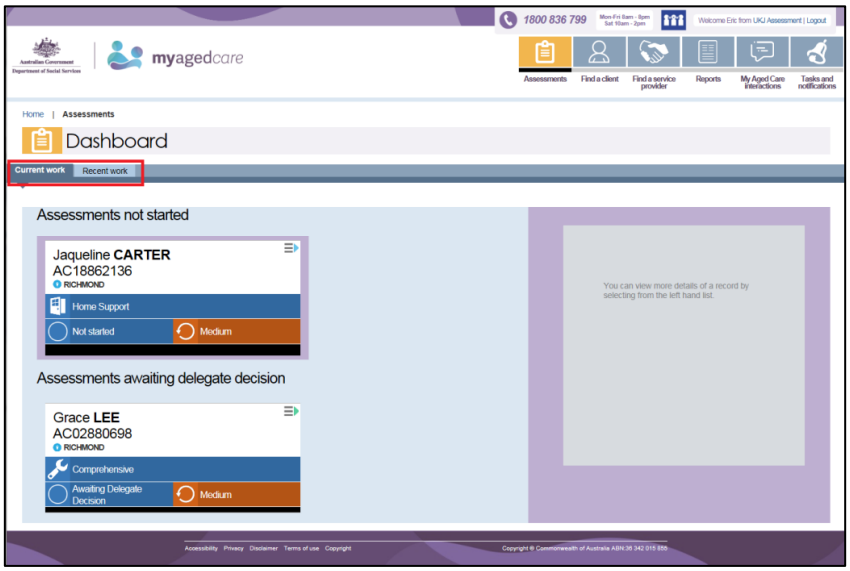
3.5.2 Accessing assessments

To access an assessment follow the steps below.

Step One: Select ‘Assessments’ on the homepage.



Step Two: From the Assessments page, Assessors will be able to see the clients assigned to them in ‘Current work’ or ‘Recent work’.



The ‘Current work’ tab contains assessments which

- Have not been started
- Are in progress
- Are completed but not yet finalised
- Are awaiting delegate decision (for comprehensive assessments).

The ‘Recent work’ tab contains assessments which have been finalised.

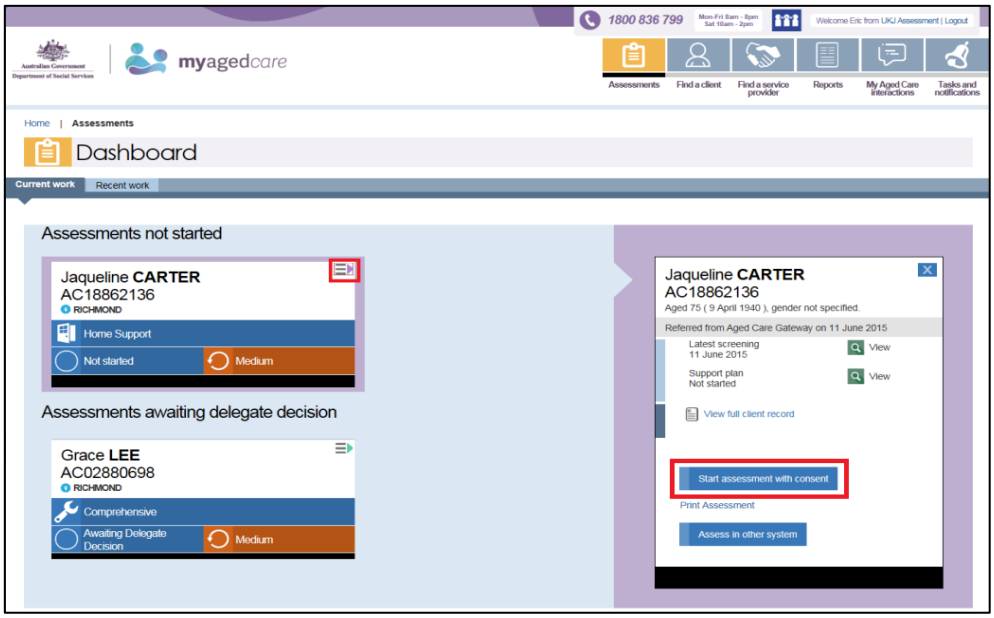
3.5.3 Starting an assessment

Refer to the National Screening and Assessment Form User Guide for guidance on the information to be collected for each question.

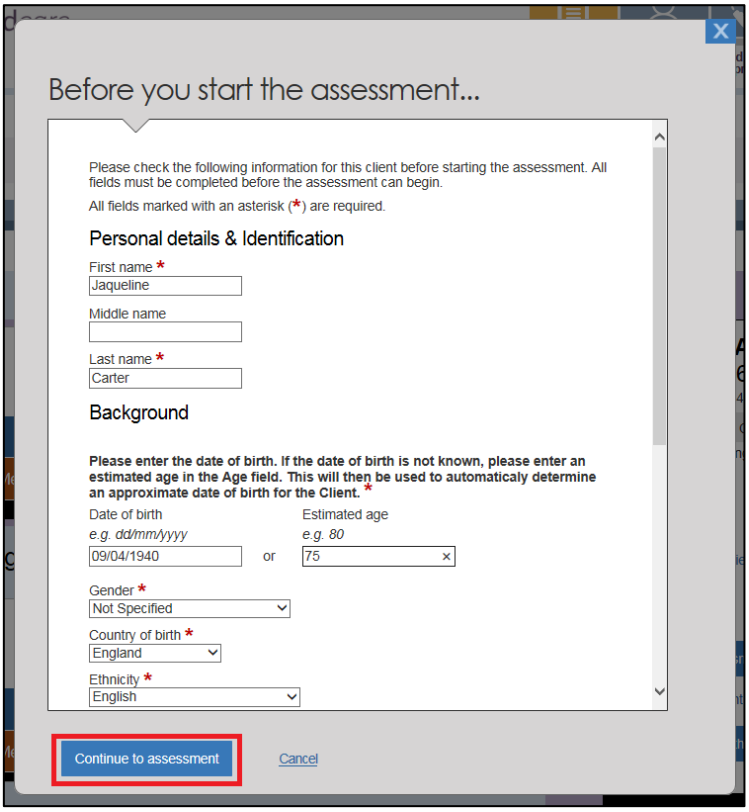
You need to obtain the client's (or their representative's) consent to undertake an assessment

To start an assessment, follow the steps below.

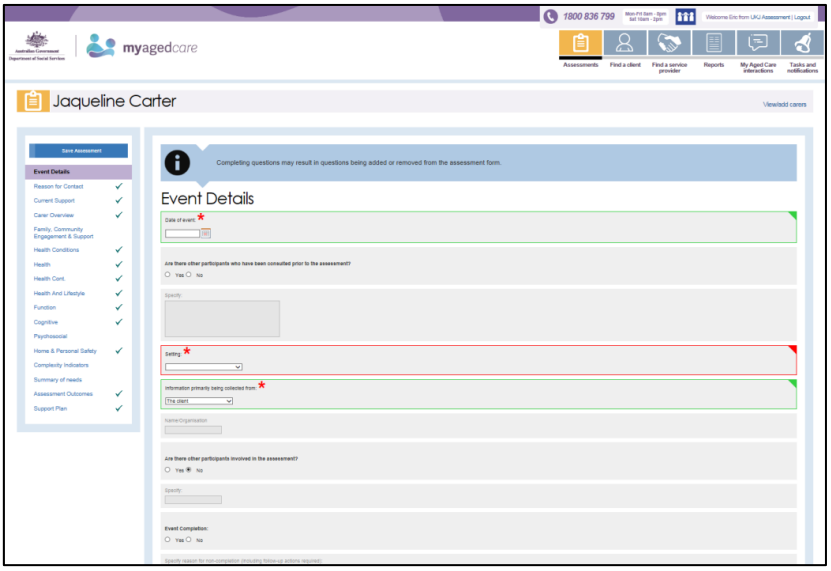
Step One: Select the arrow on the 'Client card'. A summary of client information will be displayed on the right hand side of the page. To view more information, including previous screening and assessment information, select 'View full client record'. Select 'Start assessment with consent' to start the assessment.



Step Two: You will be prompted to review (and update) information from the client's profile. Once the required information is entered, select 'Continue to assessment'.


Before you start the assessment...
Please check the following information for this client before starting the assessment. All fields must be completed before the assessment can begin.
All fields marked with an asterisk (*) are required.
Personal details & Identification
First name *
Jaqueline
Middle name
Last name *
Carter
Background
Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automaticaly determine an approximate date of birth for the Client. *
Date of birth
e.g. dd/mm/yyyy
09/04/1940
or
Estimated age
e.g. 80
75
Gender *
Not Specified
Country of birth *
England
Ethnicity *
English
Continue to assessment
Cancel

Step Three: The NSAF will be displayed. It will contain information from previous screening or assessment events, if applicable. Complete the assessment.



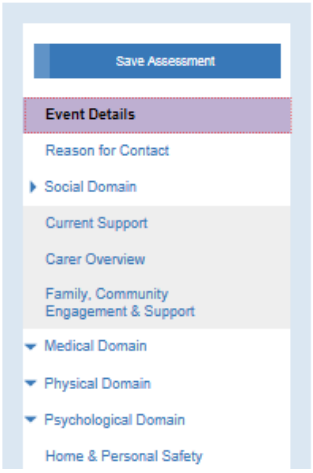
Note: If you have not finished completing the NSAF and want to complete it at a later time, select ‘Save Assessment’. You can continue the NSAF by following Steps One to Three (from your ‘In Progress’ assessments in your ‘Current Work’ tab).

The questions and screens displayed will depend on the level of assessment being undertaken. Completing questions may result in other questions being added or removed.

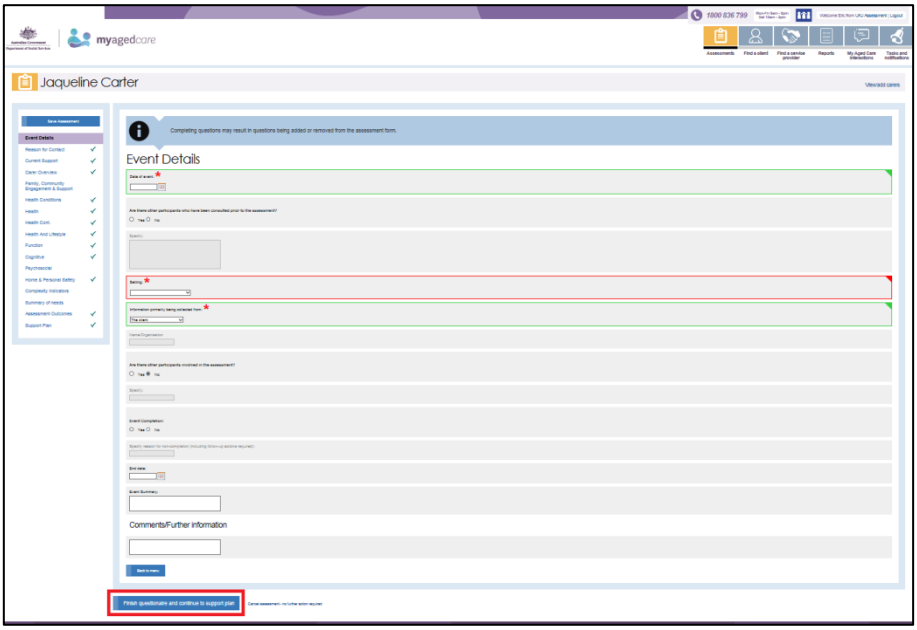
Information will only pre-populate into the NSAF where the previous assessment event has been marked as completed i.e. a home support assessment will only prepopulate where the preceding screening has been marked as ‘Complete’.

Prompts will appear at the top of each page and next to each field where information that is mandatory has not been completed. Ticks will appear on the left hand side navigation panel when all mandatory questions (marked with an asterisk) have been completed for that section.

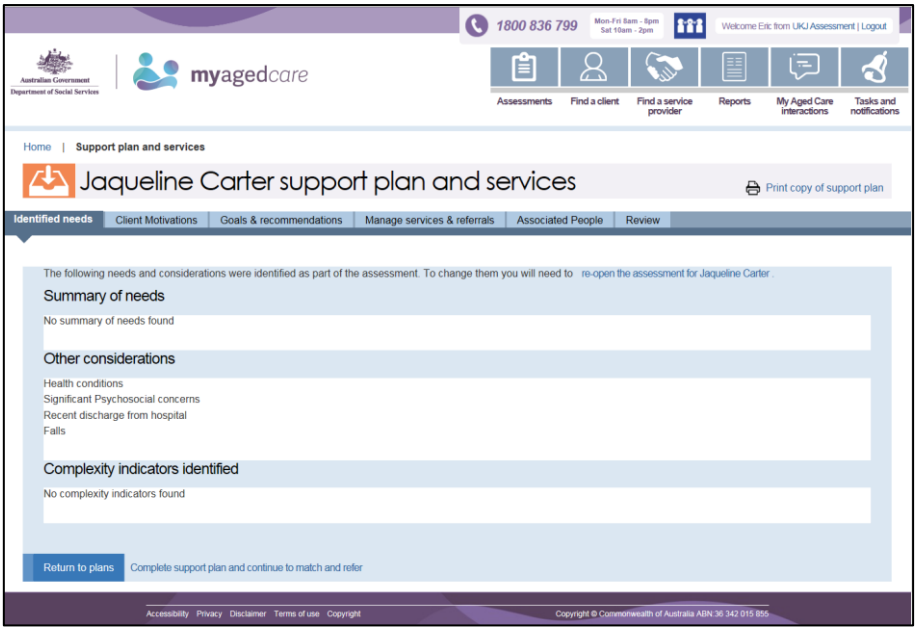
For comprehensive assessment, screens will be condensed on the navigation menu under Domain headings. Select the Domain heading to access question screens related to that Domain.



Step Four: Select 'Finish Assessment and continue to support plan' when you have completed the assessment.



You will be redirected to the client's 'support plan and services' page.

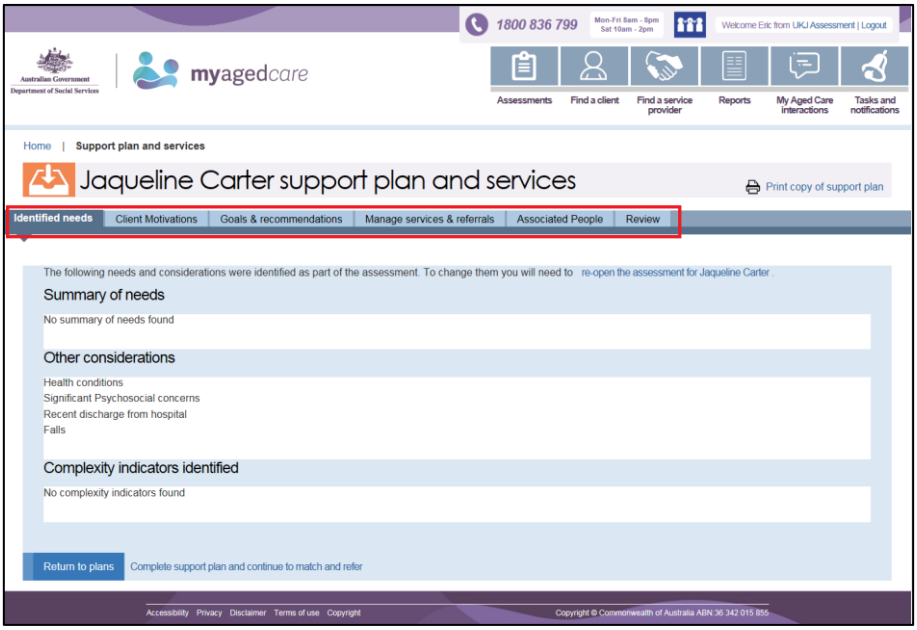

1800 836 799
myagedcare
Assessments
Find a client
Find a service provider
Reports
My Aged Care interactions
Tasks and notifications
Home | Support plan and services
Jaqueline Carter support plan and services
Print copy of support plan
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
The following needs and considerations were identified as part of the assessment. To change them you will need to re-open the assessment for Jaqueline Carter .
Summary of needs
No summary of needs found
Other considerations
Health conditions
Significant Psychosocial concerns
Recent discharge from hospital
Falls
Complexity indicators identified
No complexity indicators found
Return to plans
Complete support plan and continue to match and refer

3.6 Developing a support plan

A support plan identifies areas of concern, goals to address these areas of concern, and recommendations for services or actions to be undertaken to achieve the identified goals.

The support plan is developed by the Assessor and the client at the face-to-face assessment.

For more information about what is contained in a support plan, see the Guidance for Assessors.


1800 836 799
Welcome Eric from UKJ Assessment | Logout
myagedcare
Assessments
Find a client
Find a service provider
Reports
My Aged Care interactions
Tasks and notifications
Home | Support plan and services
Jaqueline Carter support plan and services
Print copy of support plan
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
The following needs and considerations were identified as part of the assessment. To change them you will need to re-open the assessment for Jaqueline Carter.
Summary of needs
No summary of needs found
Other considerations
Health conditions
Significant Psychosocial concerns
Recent discharge from hospital
Falls
Complexity indicators identified
No complexity indicators found
Return to plans
Complete support plan and continue to match and refer
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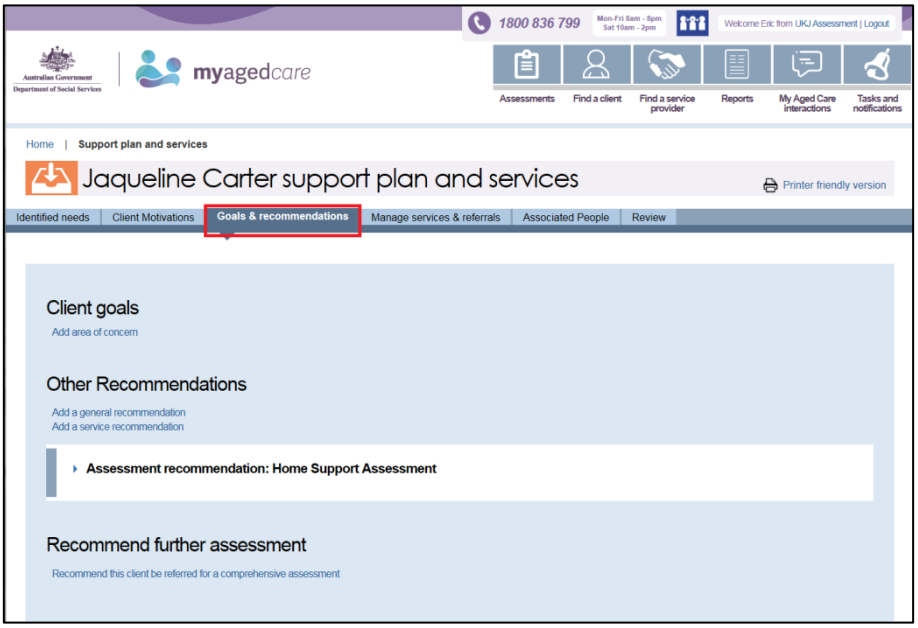
Copyright © Commonwealth of Australia ABN 36 342 015 855

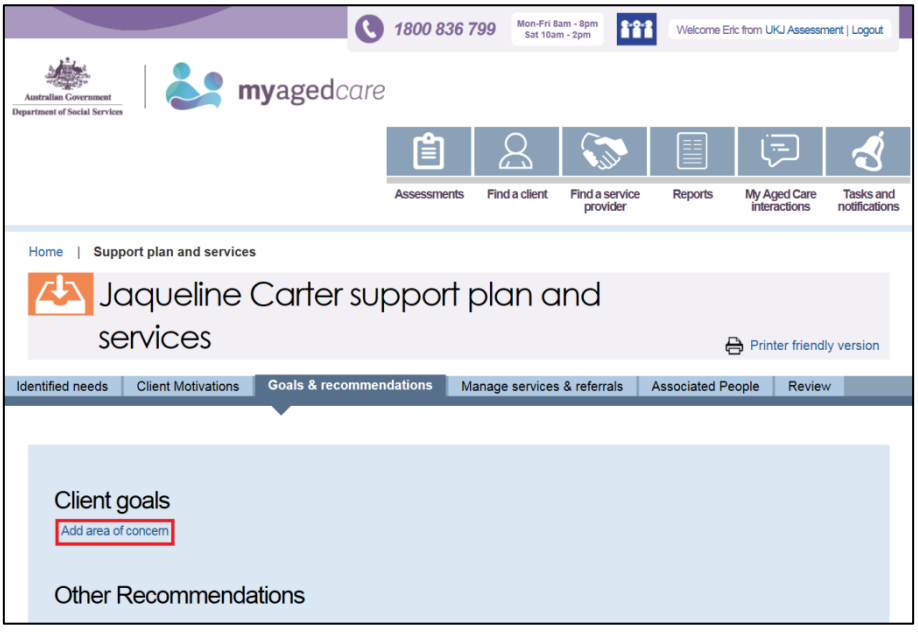
3.6.1 Adding an area of concern

To add information about an area of concern follow the steps below.

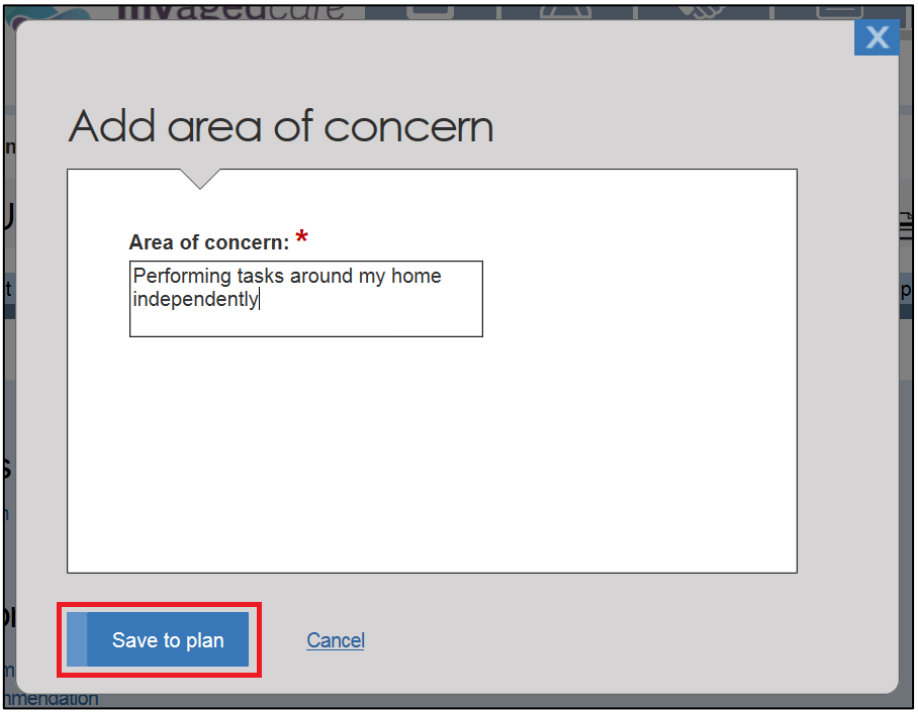
Step One: Select ‘Goals & recommendations’.



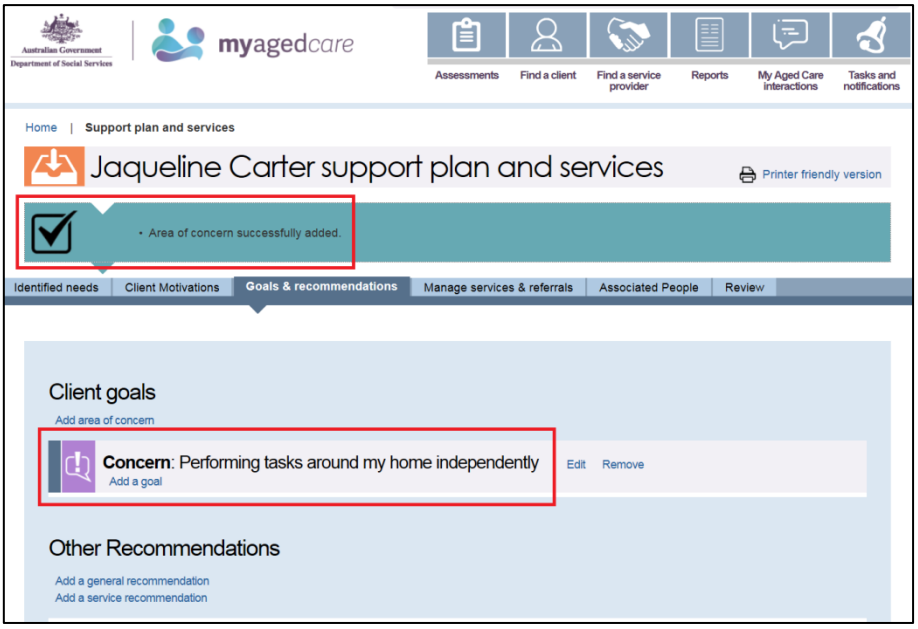
Step Two: Select ‘Add an Area of Concern’.



Step Three: Enter the client's concern and select 'Save to plan'.



Step Four: You will receive a confirmation message that the concern has been added to the plan.



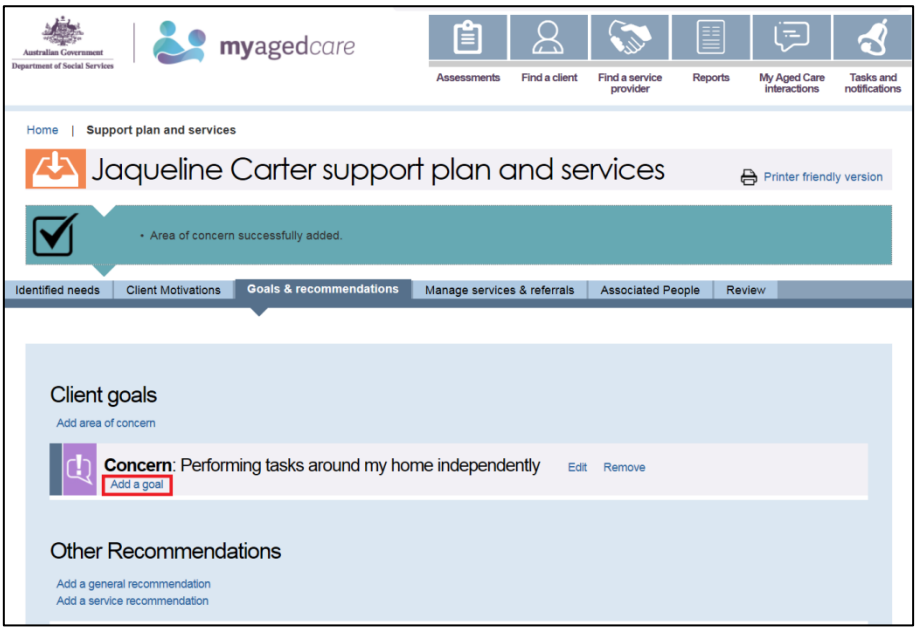
Note: You may edit or remove the area of concern once it has been added, by selecting either 'Edit' or 'Remove'.

3.6.2 Adding a goal to an area of concern

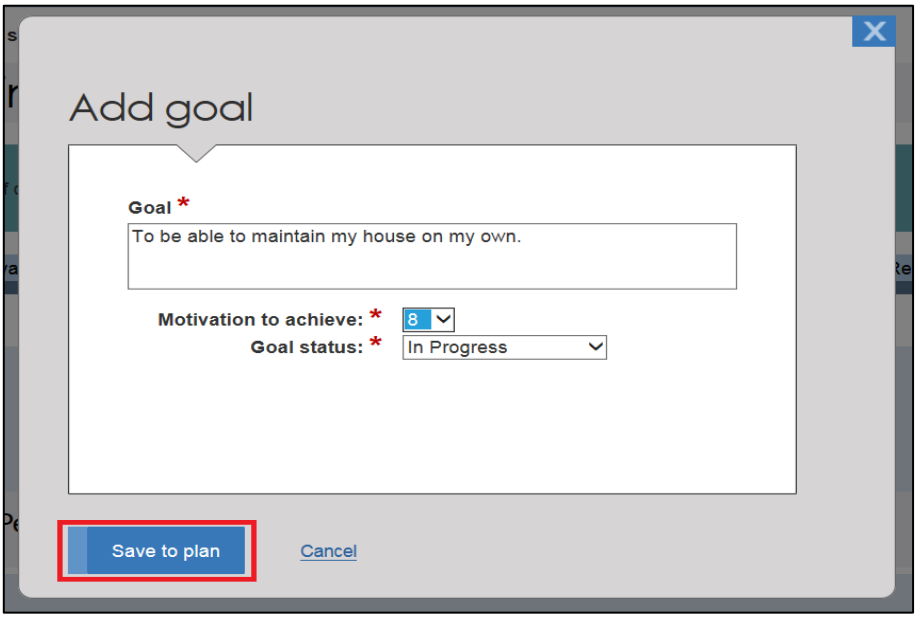
When you have created an 'Area of Concern', you can add a goal to address the concern.

To add a goal to address the concern follow the steps below.

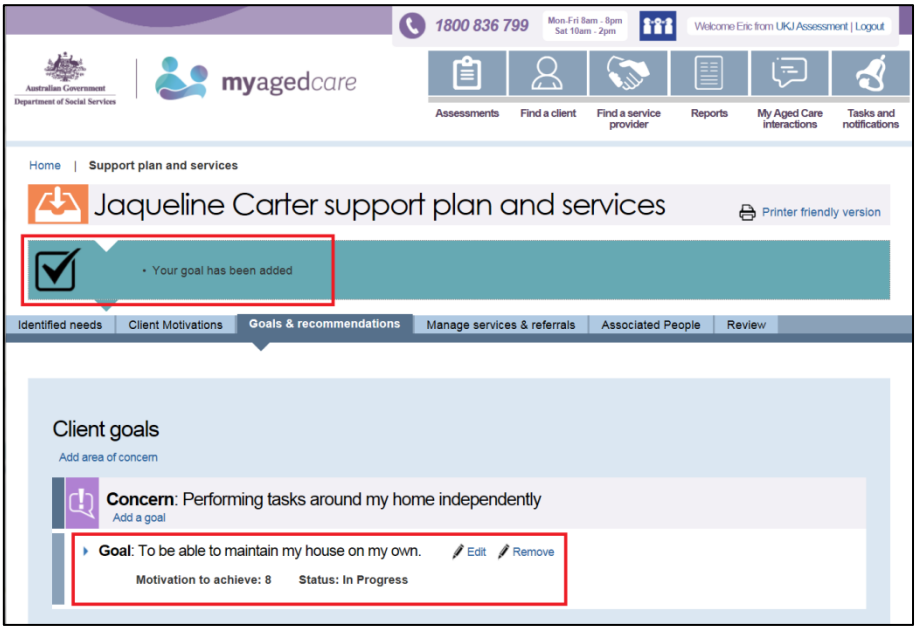
Step One: Select 'Add a goal' under the concern to be addressed



Step Two: Enter the goal, record the client's motivation (with 1 being least motivated to 10 being highly motivated) to achieve that goal; and indicate the goal status. Select 'Save to plan'.



Step Three: You will receive a confirmation message that the goal has been added. Continue to add concerns and goals, as appropriate.



Note: You may edit or remove the goal once it has been added, by selecting either ‘Edit’ or ‘Remove’.

3.6.3 Adding recommendations

There are three types of recommendations that can be added to a support plan:

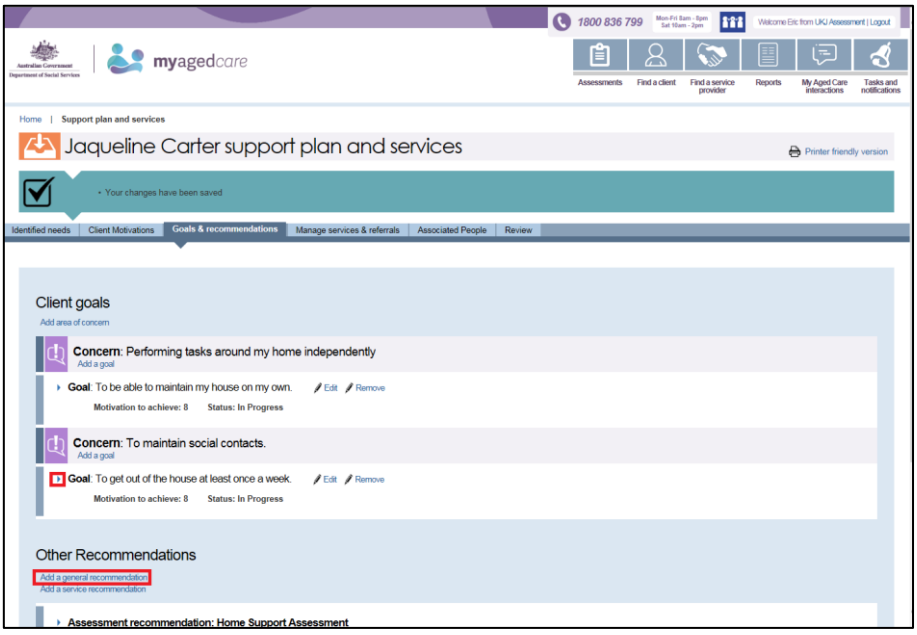
- General recommendations
- Service recommendations
- A recommendation for a care type under the Act (requiring a Delegate Decision)

For more information about different recommendations, see Guidance for Assessors, available at dss.gov.au/MyAgedCare.

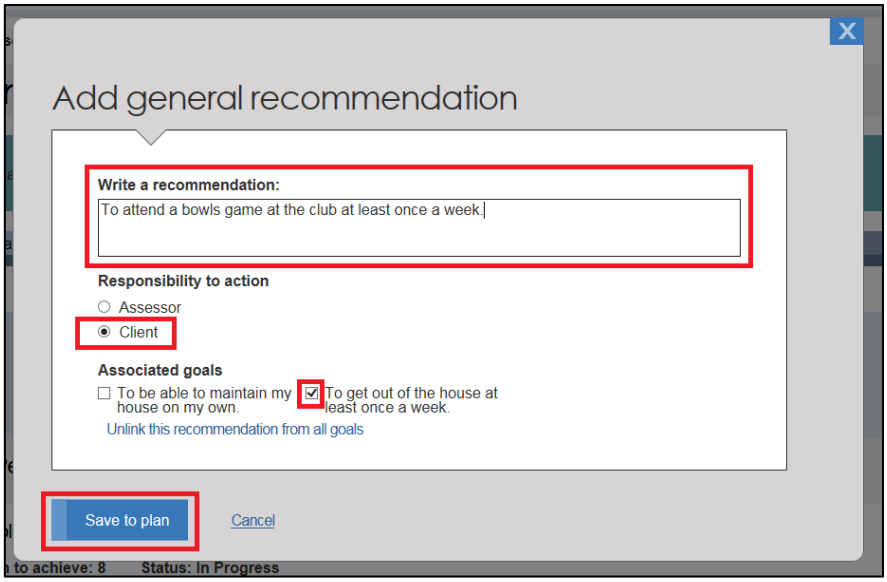
3.6.3.1 Adding a general recommendation

To add a general recommendation follow the steps below.

Step One: From the 'Goals & recommendations' tab, select 'Add a general recommendation'. Select the arrow beside a goal to view options to add recommendations.



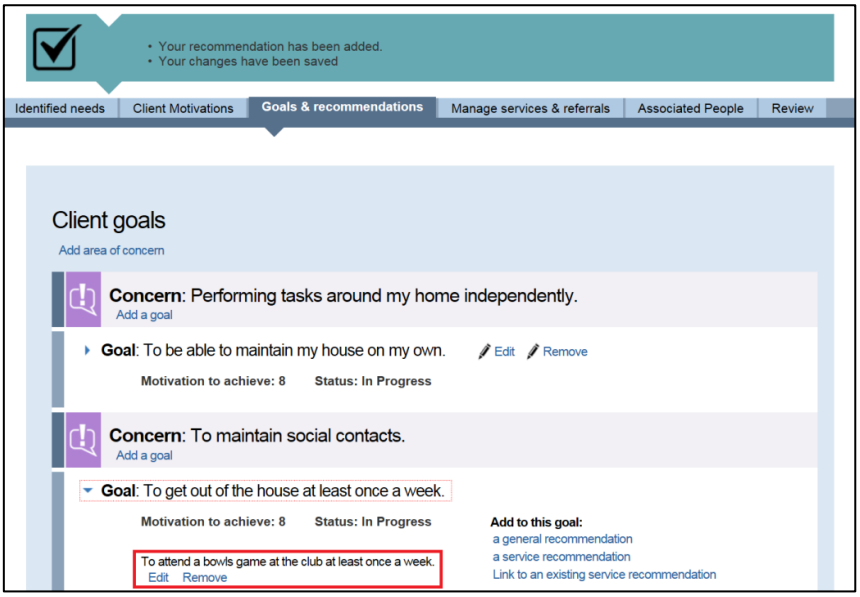
Step Two: A page will display that allows you to add information relating to the general recommendation. You can also link this general recommendation to an associated goal. Enter required information and select 'Save to plan'.


Add general recommendation
Write a recommendation:
To attend a bowls game at the club at least once a week.
Responsibility to action
Assessor
Client
Associated goals
To be able to maintain my house on my own.
To get out of the house at least once a week.
Unlink this recommendation from all goals
Save to plan
Cancel
to achieve: 8
Status: In Progress

Note: Recommendations can be associated to more than one goal. From the 'Add general recommendation' page, you can:

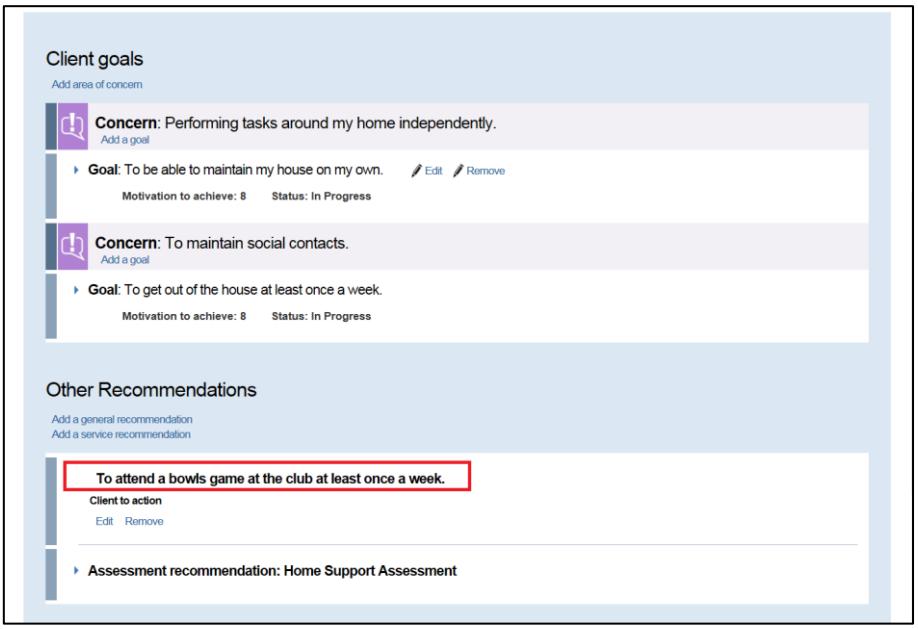
- Select one or more goals to associate a recommendation with
- Unlink the recommendation from all goals.

Step Three: The general recommendation is added to the support plan. If it was associated with a goal, it will appear under the goal when expanded.


Your recommendation has been added.
Your changes have been saved
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Client goals
Add area of concern
Concern: Performing tasks around my home independently.
Add a goal
Goal: To be able to maintain my house on my own.
Edit
Remove
Motivation to achieve: 8
Status: In Progress
Concern: To maintain social contacts.
Add a goal
Goal: To get out of the house at least once a week.
Motivation to achieve: 8
Status: In Progress
Add to this goal:
a general recommendation
a service recommendation
Link to an existing service recommendation
To attend a bowls game at the club at least once a week.
Edit
Remove

Note: You may edit or remove the goal once it has been added, by selecting either 'Edit' or 'Remove'.

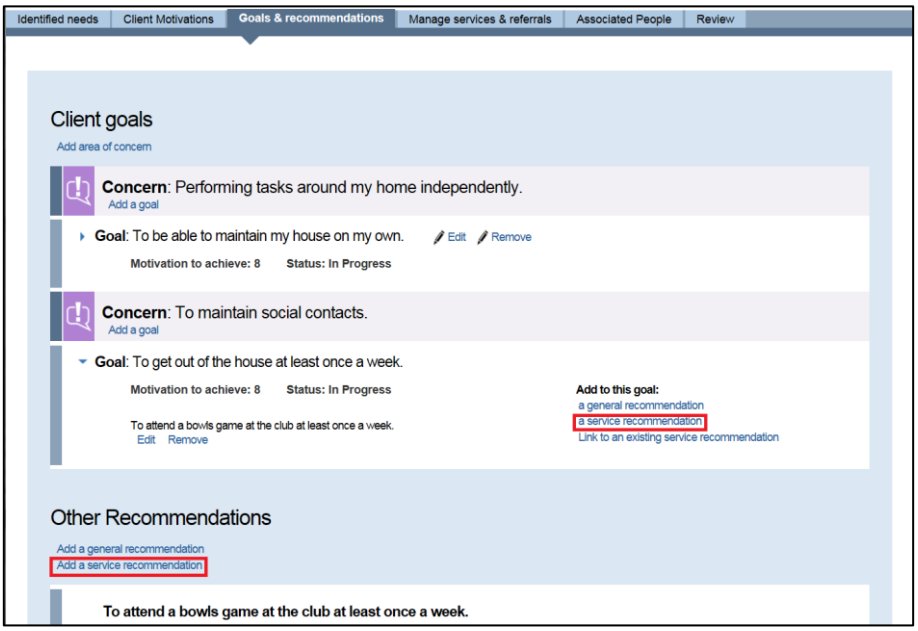
Step Four: The general recommendation will be added as part of 'Other Recommendations' if it was not linked to a goal.


Client goals
Add area of concern
Concern: Performing tasks around my home independently.
Add a goal
Goal: To be able to maintain my house on my own.
Edit
Remove
Motivation to achieve: 8
Status: In Progress
Concern: To maintain social contacts.
Add a goal
Goal: To get out of the house at least once a week.
Motivation to achieve: 8
Status: In Progress
Other Recommendations
Add a general recommendation
Add a service recommendation
To attend a bowls game at the club at least once a week.
Client to action
Edit
Remove
Assessment recommendation: Home Support Assessment

3.6.3.2 Adding a service recommendation

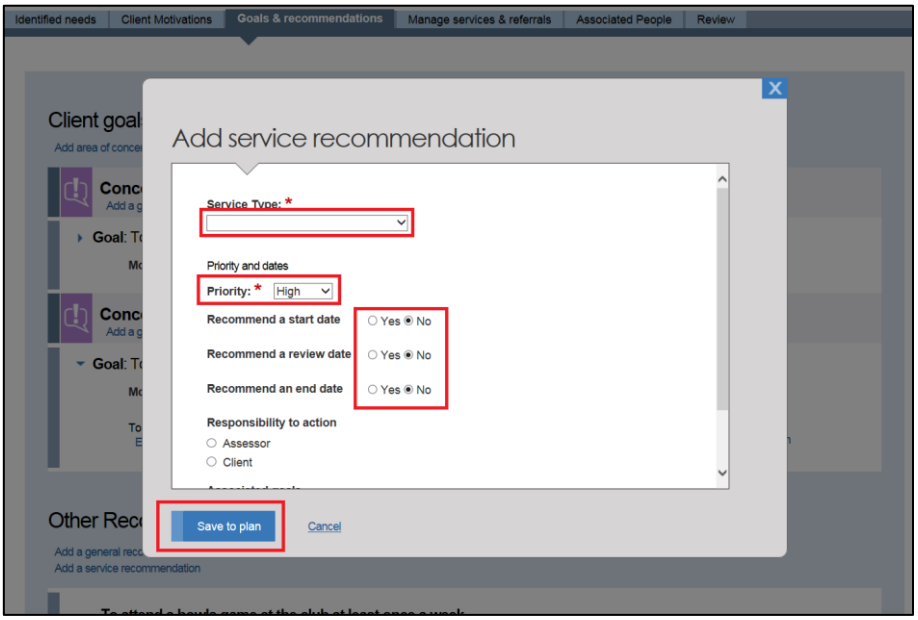
To add a service recommendation follow the steps below.

Step One: From the 'Goals & recommendations' tab, select 'Add service recommendation'.


Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Client goals
Add area of concern
Concern: Performing tasks around my home independently.
Add a goal
Goal: To be able to maintain my house on my own.
Edit
Remove
Motivation to achieve: 8
Status: In Progress
Concern: To maintain social contacts.
Add a goal
Goal: To get out of the house at least once a week.
Motivation to achieve: 8
Status: In Progress
To attend a bowls game at the club at least once a week.
Edit
Remove
Add to this goal:
a general recommendation
a service recommendation
Link to an existing service recommendation
Other Recommendations
Add a general recommendation
Add a service recommendation
To attend a bowls game at the club at least once a week.

Note: You can also select the arrow beside a goal to view options to add recommendations (general and service).

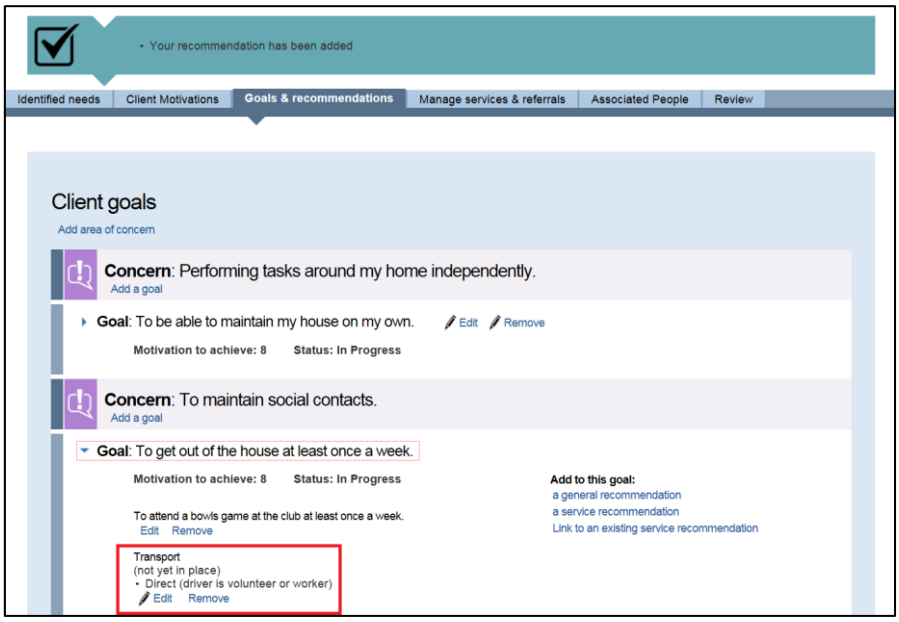
Step Two: Fill in the mandatory fields, and add in any additional information. You can also link the service recommendation to an identified goal. Select 'Save to plan'.



Note: Recommendations can be associated to more than one goal. From the 'Add service recommendation' page, you can:

- Select one or more goals to associate a recommendation with
- Unlink the recommendation from all goals.

Step Three: The service recommendation will be added to the support plan. If it was associated to a goal, it will appear under the goal it when expanded. If the service recommendation was not associated with a goal, it will appear under 'Other Recommendations'.



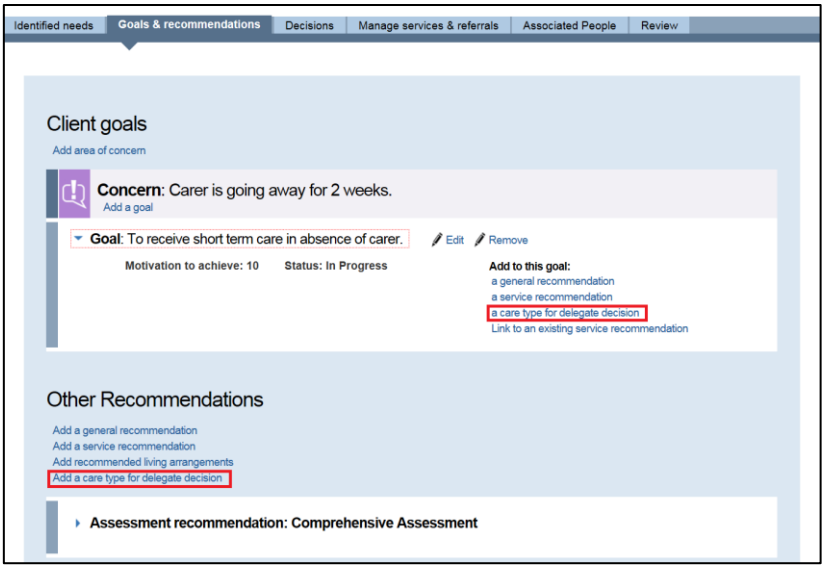
You may edit or remove the goal once it has been added, by selecting either 'Edit' or 'Remove'.

3.6.3.3 Adding a care type for Delegate decision

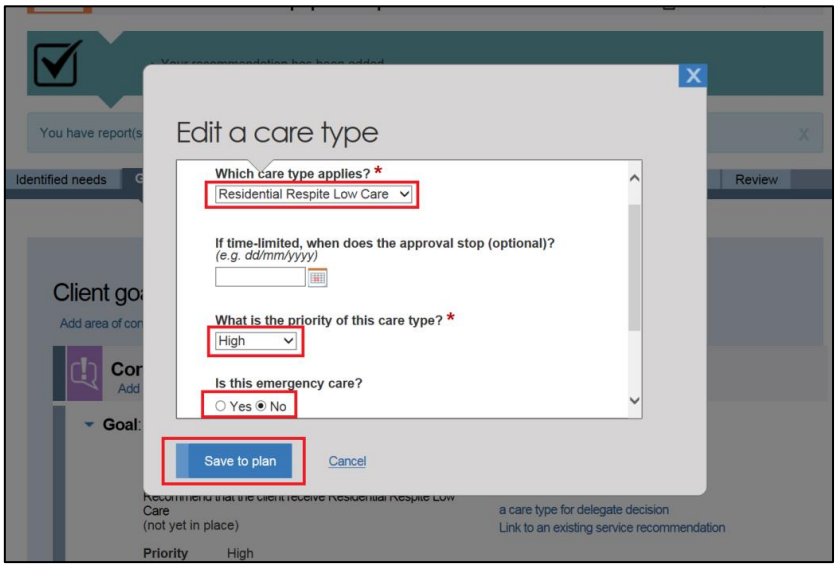
> This option is only available to ACATs conducting a comprehensive assessment.

To add a care type for Delegate decision follow the steps below.

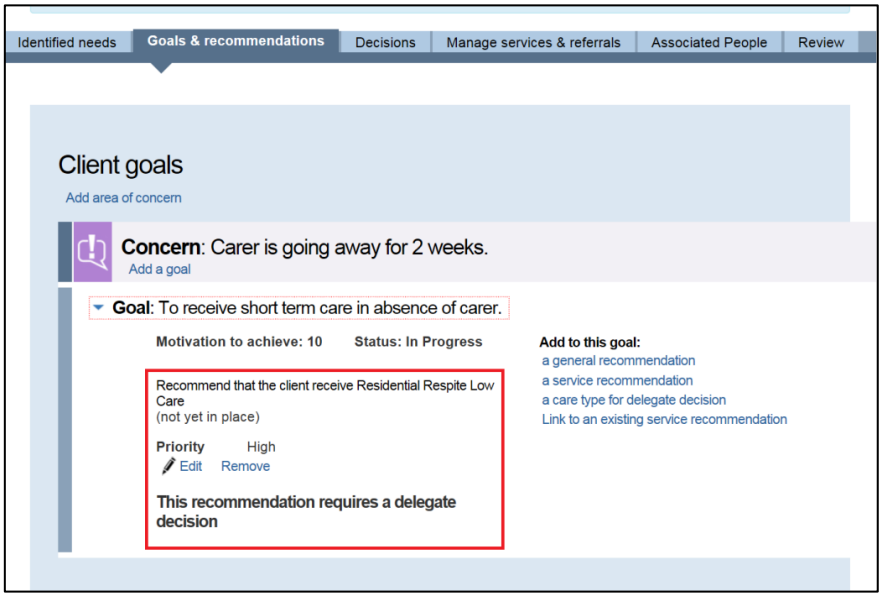
Step One: From the 'Goals & recommendations' tab, select 'Add a care type for delegate decision'. You can do this from two places as seen in the screenshot below.



Step Two: Fill in the required information about the care type recommended for approval. Additional information may be required, depending on the type of care selected (i.e. if it recommended as a time limited approval, the priority of the referral, and if it was an emergency admission). Select 'Save to plan'.



Step Three: The care recommendation will be added as part of 'Other Recommendations'.



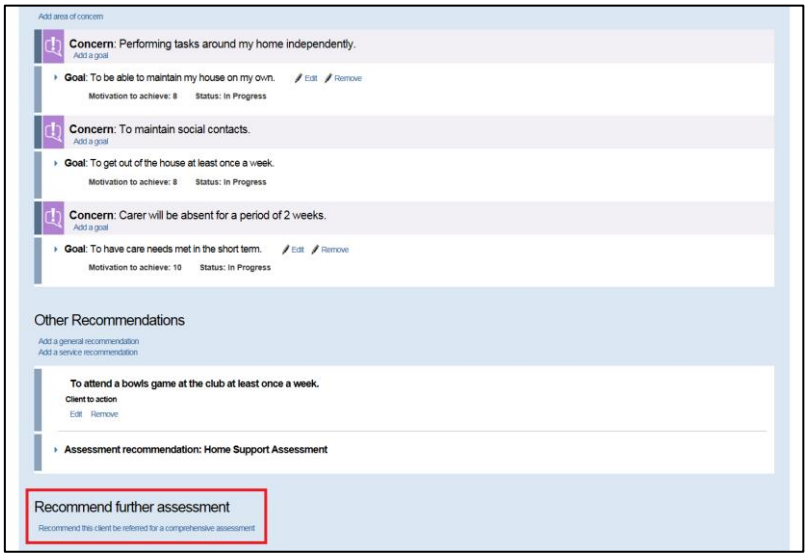
Note: You may edit or remove the care type recommendation once it has been added (but before submitting it to the Delegate for approval), by selecting either 'Edit' or 'Remove'.

3.6.3.4 Recommending further assessment

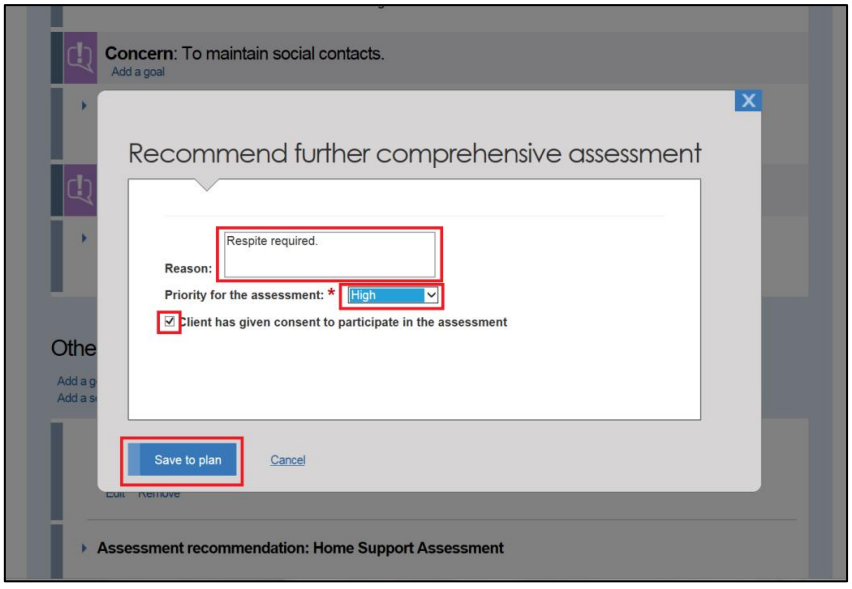
If at the end of a home support assessment, it is recommended that the client requires a comprehensive assessment of their needs, the Assessor can make this recommendation in the support plan.

The steps to take to recommend a further assessment are outlined below.

Step One: From the 'Goals & recommendations' tab, select 'Recommend the client be referred for a comprehensive assessment'.


Concern: Performing tasks around my home independently.
Goal: To be able to maintain my house on my own.
Concern: To maintain social contacts.
Goal: To get out of the house at least once a week.
Concern: Carer will be absent for a period of 2 weeks.
Goal: To have care needs met in the short term.
Other Recommendations
To attend a bowls game at the club at least once a week.
Assessment recommendation: Home Support Assessment
Recommend further assessment

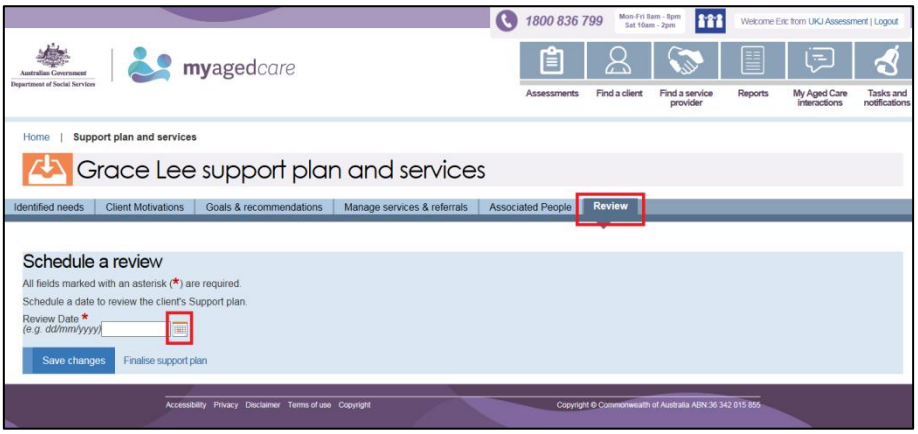
Step Two: Enter information about the recommendation for further assessment, and select 'Save to plan'. You will only be able to 'Save to plan' once you have recorded that you have the client's consent to undertake the assessment.



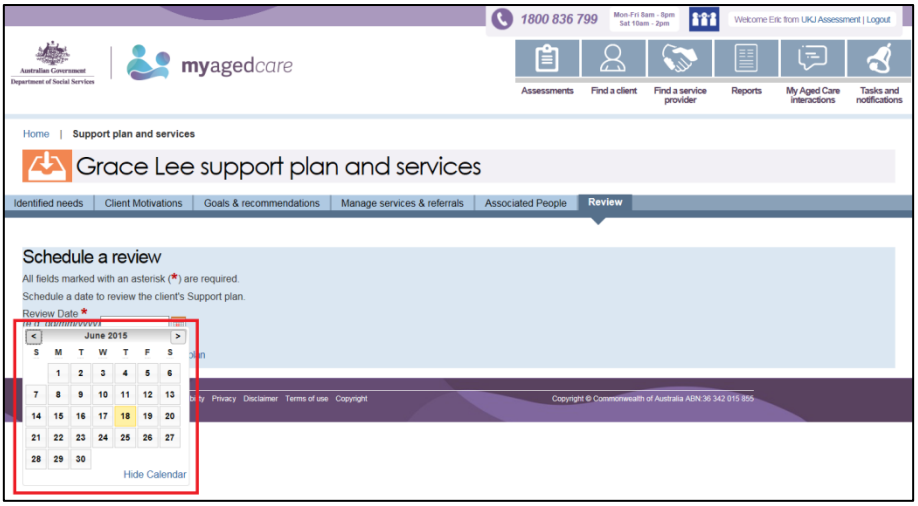
3.6.4 Conduct a review of a client

The RAS will be able to conduct a review of a client's support plan.

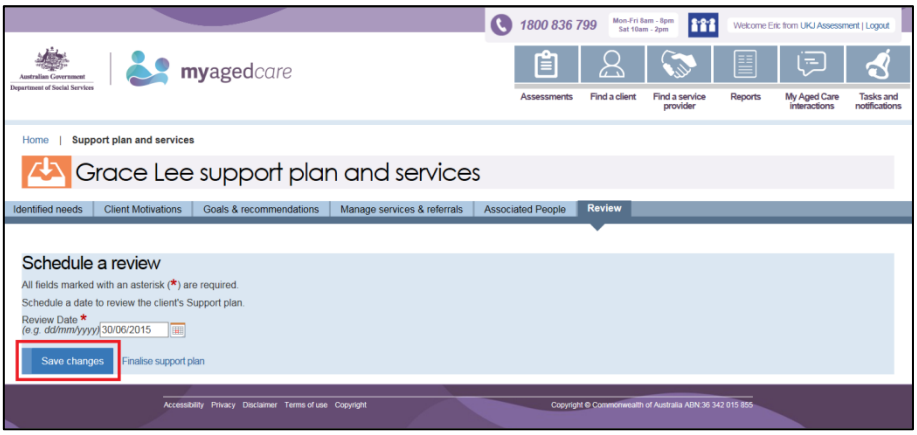
Step One: To schedule a review of a client, navigate to the 'Review' tab and select the calendar icon to choose a Review date.



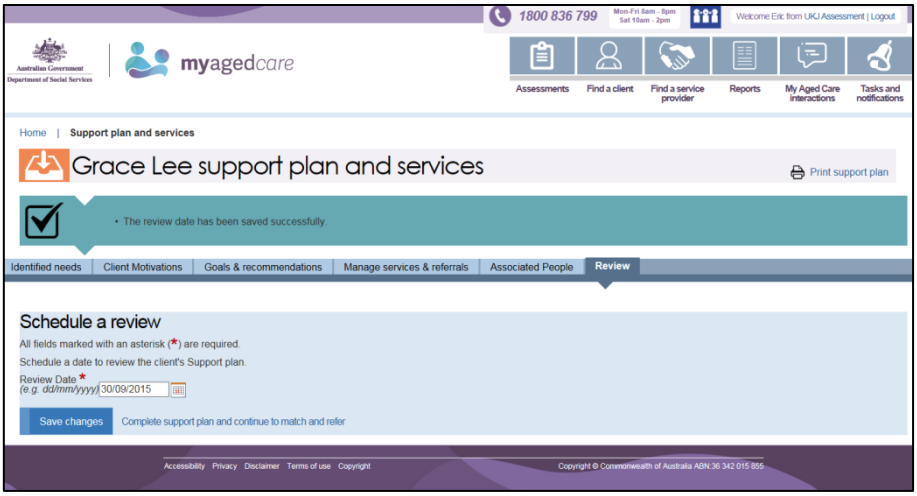
Step Two: A drop down calendar will be displayed, and a review date can be selected.


1800 836 799
myagedcare
Assessments
Find a client
Find a service provider
Reports
My Aged Care interactions
Tasks and notifications
Home | Support plan and services
Grace Lee support plan and services
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Schedule a review
All fields marked with an asterisk (*) are required.
Schedule a date to review the client's Support plan.
Review Date *
June 2015
S M T W T F S
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30
Hide Calendar
Privacy Disclaimer Terms of use Copyright
Copyright © Commonwealth of Australia ABN 36 342 015 855

Step Three: Once a date has been chosen, select ‘Save changes’ to set the support plan review date.



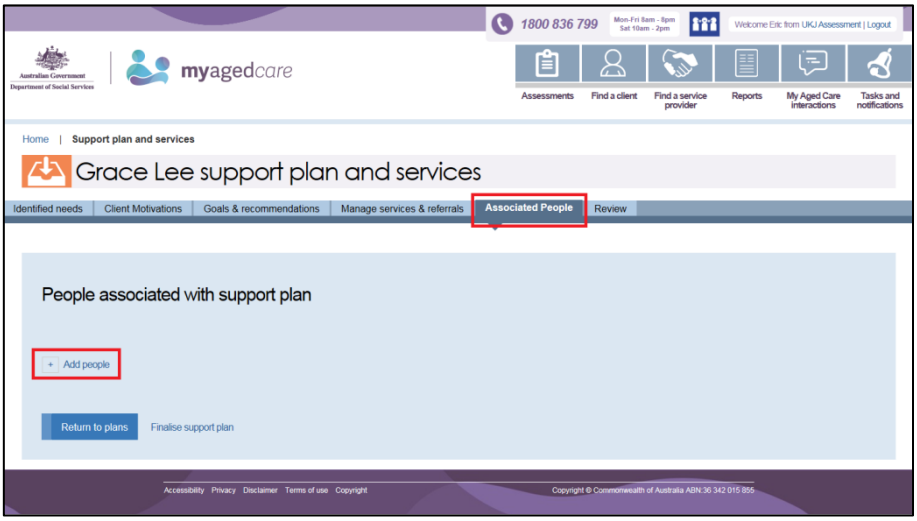
Confirmation of the support plan review date will be displayed under the ‘Review’ Tab.


1800 836 799
Welcome Eric from UKJ Assessment | Logout
myagedcare
Assessments
Find a client
Find a service provider
Reports
My Aged Care interactions
Tasks and notifications
Home | Support plan and services
Grace Lee support plan and services
Print support plan
• The review date has been saved successfully.
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Schedule a review
All fields marked with an asterisk (*) are required.
Schedule a date to review the client's Support plan.
Review Date *
(e.g. dd/mm/yyyy) 30/09/2015
Save changes
Complete support plan and continue to match and refer
Accessibility Privacy Disclaimer Terms of use Copyright
Copyright © Commonwealth of Australia ABN 36 342 015 855

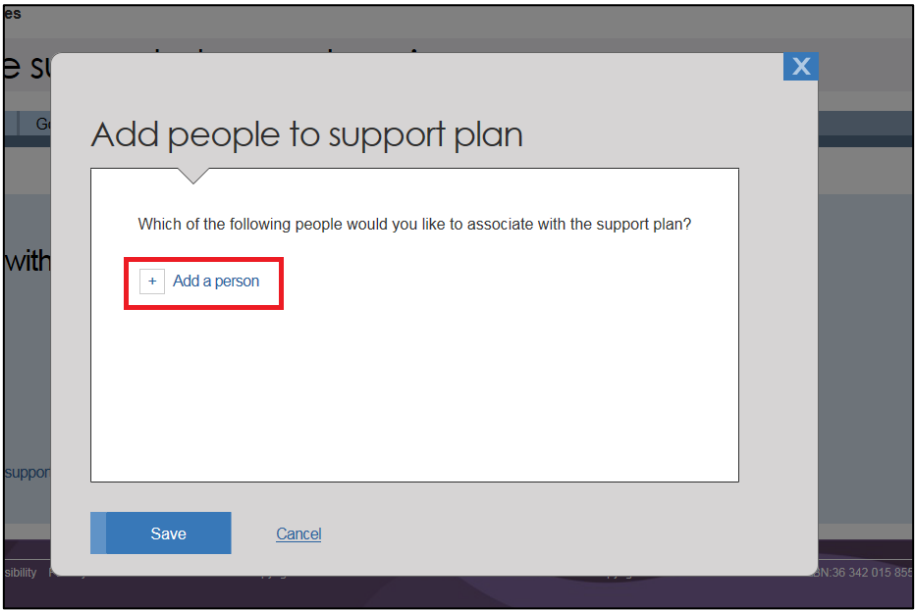
The review date will be displayed on the support plan.

3.6.5 Add Associated People to the client's support plan

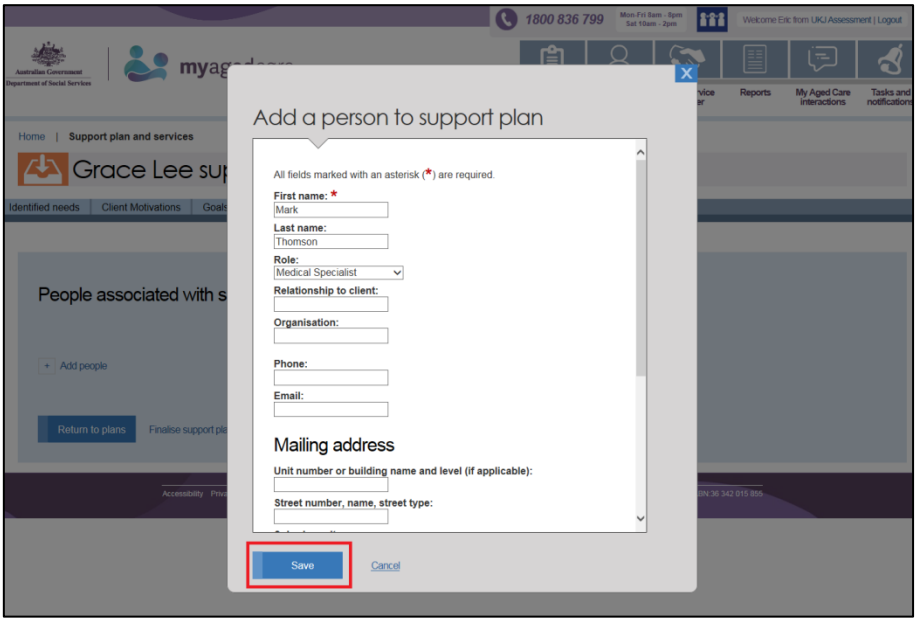
Step One: To associate a person with the client's support plan, navigate to the 'Associated People' tab and select 'Add people'.



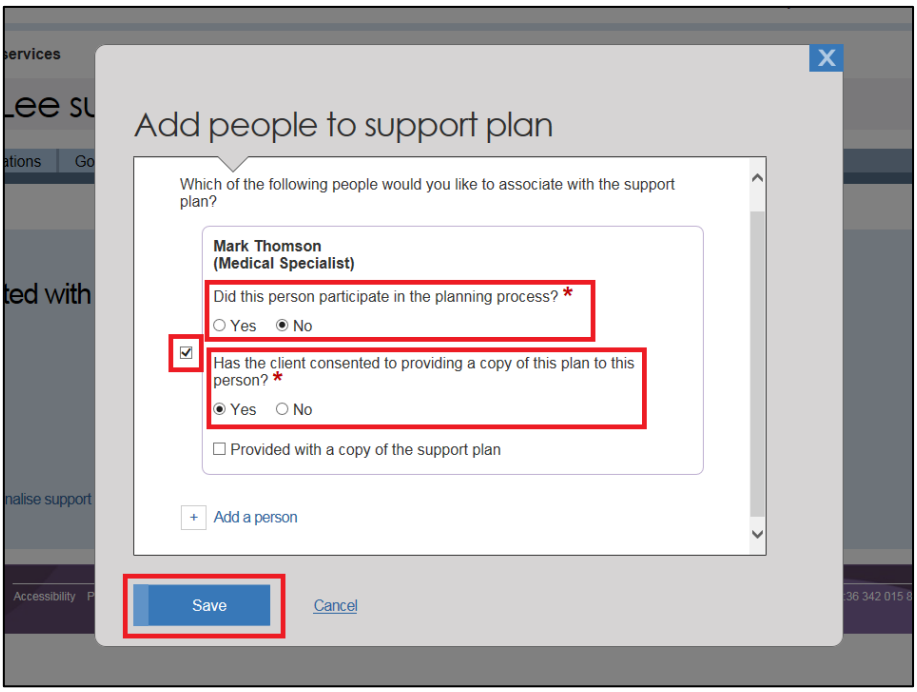
Step Two: Select 'Add a person'.


Add people to support plan
Which of the following people would you like to associate with the support plan?
Add a person
Save
Cancel

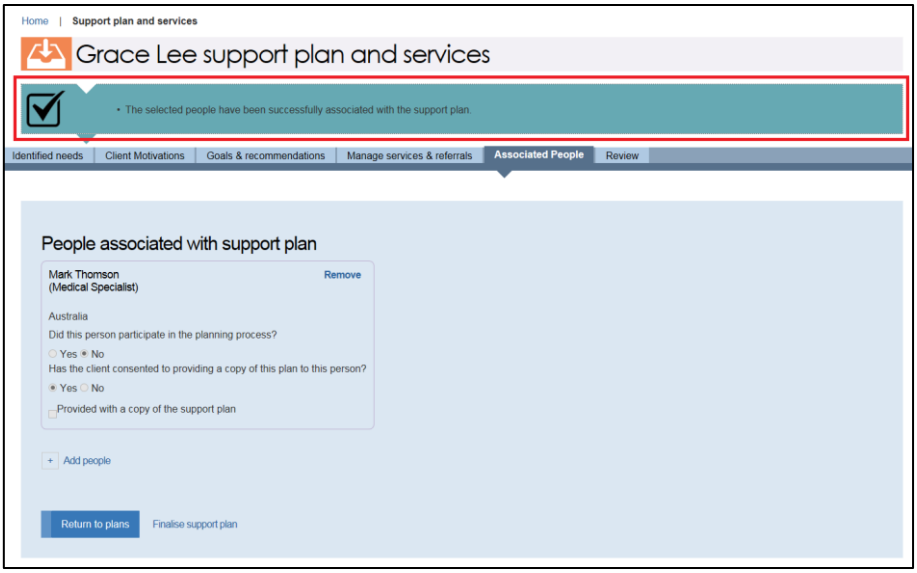
Step Three: Enter information in all mandatory fields and any additional field, and select ‘Save’.



Step Four: Select the person to be associated with the Support Plan, answer the mandatory questions, and select ‘Save’.


Add people to support plan
Which of the following people would you like to associate with the support plan?
Mark Thomson
(Medical Specialist)
Did this person participate in the planning process? *
Yes
No
Has the client consented to providing a copy of this plan to this person? *
Yes
No
Provided with a copy of the support plan
Add a person
Save
Cancel

A confirmation page will be displayed, and the selected person will now appear under the ‘Associated People’ tab. Associated people can be removed at any time by selecting ‘Remove’.

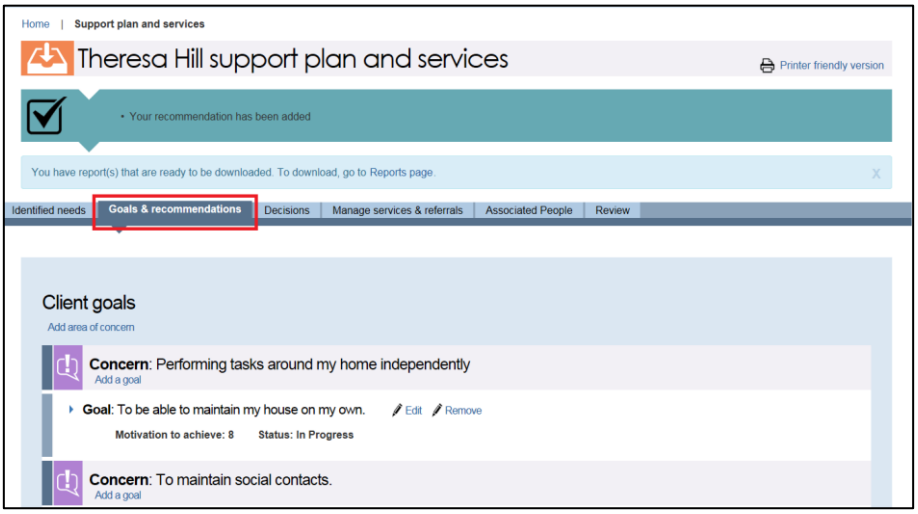

Home | Support plan and services
Grace Lee support plan and services
• The selected people have been successfully associated with the support plan.
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
People associated with support plan
Mark Thomson
(Medical Specialist)
Remove
Australia
Did this person participate in the planning process?
Yes No
Has the client consented to providing a copy of this plan to this person?
Yes No
Provided with a copy of the support plan
Add people
Return to plans
Finalise support plan

3.6.6 Completing the Support Plan

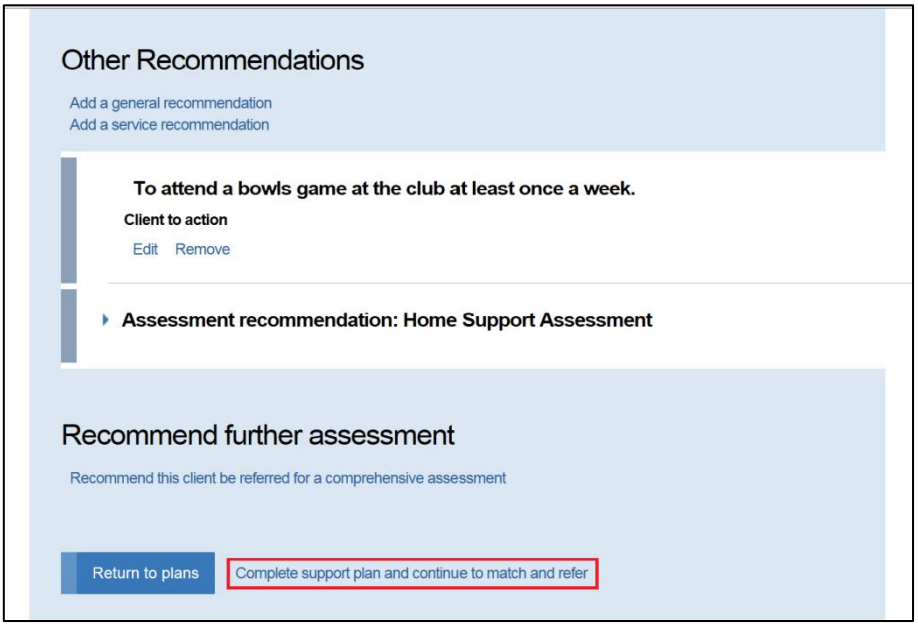
> The RAS need to undertake this step when they are ready to refer clients for services. ACATs need to undertake this step when they are ready to send the assessment and support plan to the Delegate for a decision whether to approve care under the Act.

To complete the support plan follow the steps below.

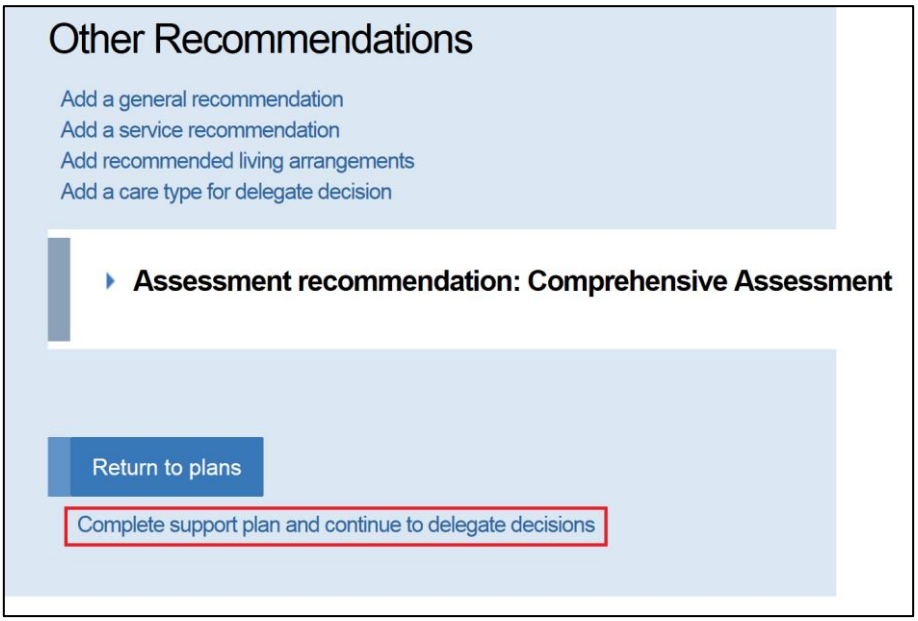
Step One: Navigate to the 'Goals & recommendations' tab in the support plan


Home | Support plan and services
Theresa Hill support plan and services
Printer friendly version
Your recommendation has been added
You have report(s) that are ready to be downloaded. To download, go to Reports page.
Identified needs
Goals & recommendations
Decisions
Manage services & referrals
Associated People
Review
Client goals
Add area of concern
Concern: Performing tasks around my home independently
Add a goal
Goal: To be able to maintain my house on my own.
Edit
Remove
Motivation to achieve: 8
Status: In Progress
Concern: To maintain social contacts.
Add a goal

Step Two: For home support assessment, select 'Complete Support Plan and continue to match and refer'. The home support assessment will now be marked as 'Completed'.


Other Recommendations
Add a general recommendation
Add a service recommendation
To attend a bowls game at the club at least once a week.
Client to action
Edit
Remove
Assessment recommendation: Home Support Assessment
Recommend further assessment
Recommend this client be referred for a comprehensive assessment
Return to plans
Complete support plan and continue to match and refer

For comprehensive assessment, select ‘Complete Support Plan and continue to delegate decisions’.


Other Recommendations
Add a general recommendation
Add a service recommendation
Add recommended living arrangements
Add a care type for delegate decision
Assessment recommendation: Comprehensive Assessment
Return to plans
Complete support plan and continue to delegate decisions

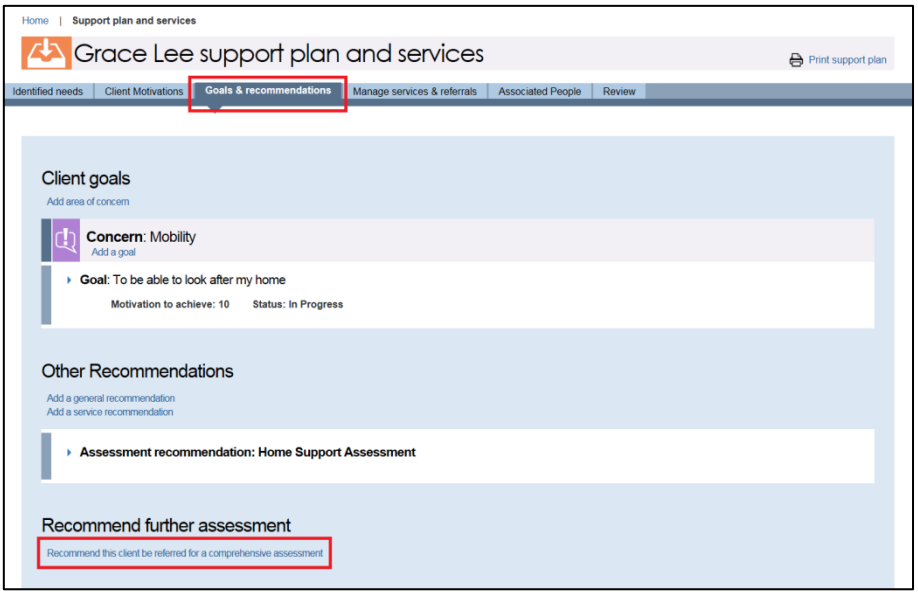
If you complete this step but have not completed all of the mandatory fields in the NSAF, you will be asked to provide a reason for not completing the information.

3.6.7 Referring clients for comprehensive assessment

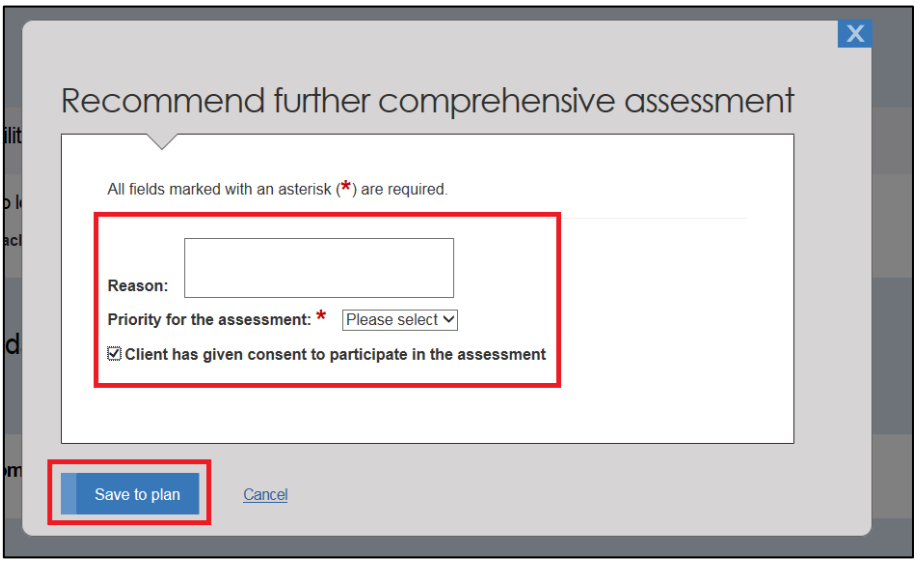
Following home support assessment, a RAS Assessor may recommend that a client is referred for a comprehensive assessment.

The steps to refer a client for comprehensive assessment are outlined below.

Step One: On the 'Goals & recommendations tab', select 'Recommend this client be referred for a comprehensive assessment'.



Step Two: A page will be displayed to allow you to enter the reason and priority for assessment, and record the client's consent.

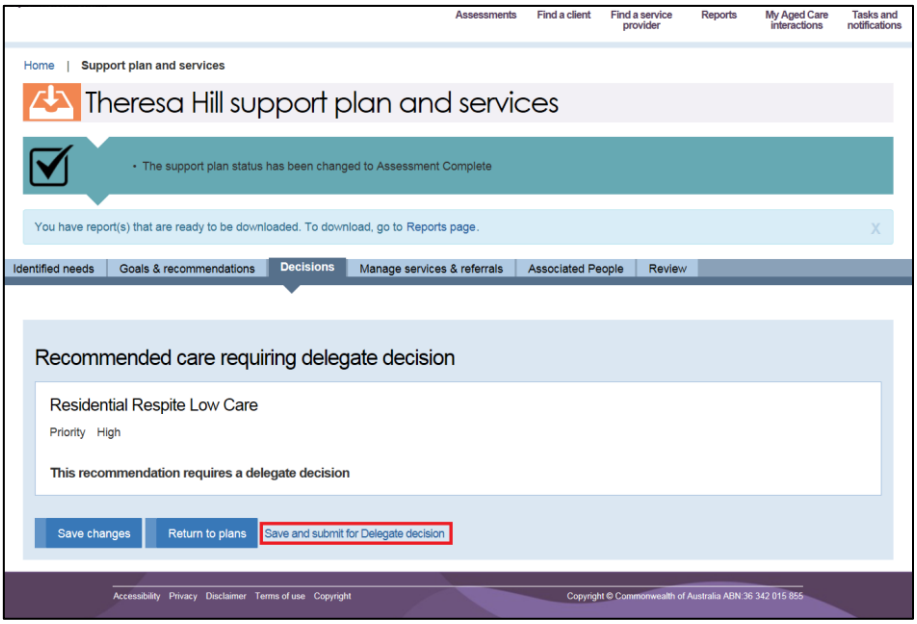

Recommend further comprehensive assessment
All fields marked with an asterisk (*) are required.
Reason:
Priority for the assessment: *
Please select
Client has given consent to participate in the assessment
Save to plan
Cancel

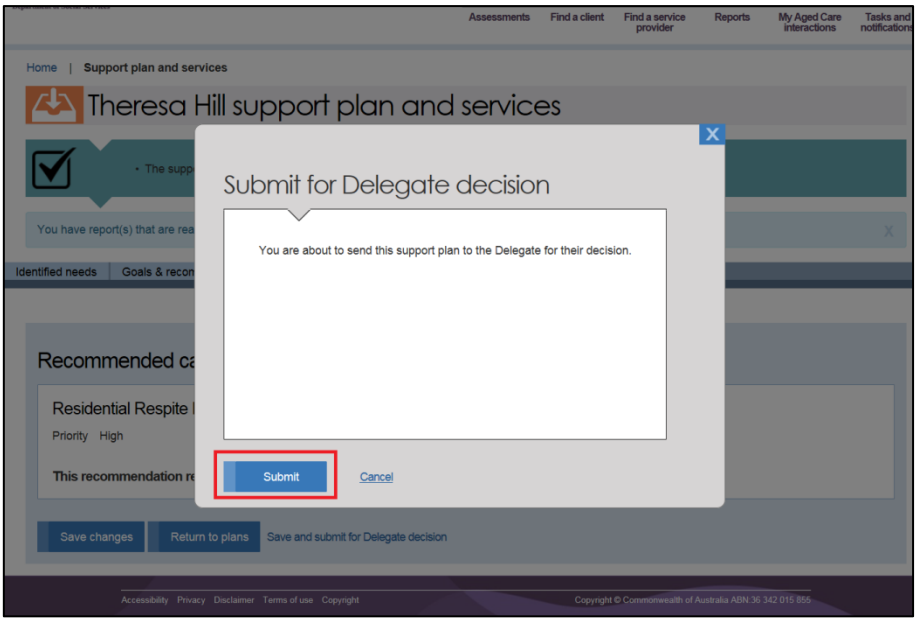
3.6.8 Submitting comprehensive assessments for Delegate decision

Once the ACAT assessor has completed the support plan, they will be taken to the 'Decisions' tab in the support plan.

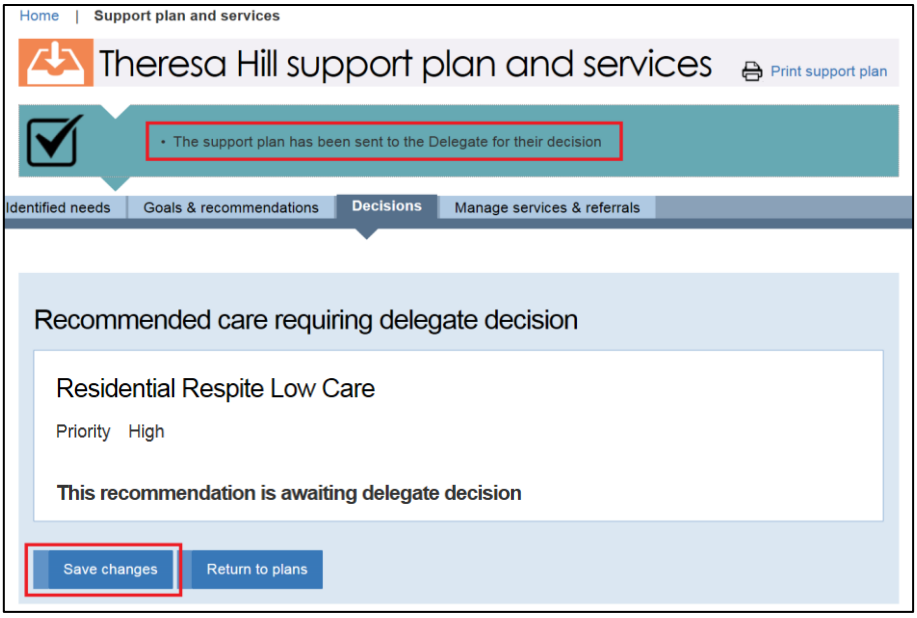
To submit a comprehensive assessment for Delegate decision follow the steps below.

Step One: Select 'Save and submit for Delegate decision', and then select 'Submit'. The comprehensive assessment will be marked as 'Awaiting Delegate Decision'.


Assessments
Find a client
Find a service provider
Reports
My Aged Care interactions
Tasks and notifications
Home | Support plan and services
Theresa Hill support plan and services
• The support plan status has been changed to Assessment Complete
You have report(s) that are ready to be downloaded. To download, go to Reports page.
Identified needs
Goals & recommendations
Decisions
Manage services & referrals
Associated People
Review
Recommended care requiring delegate decision
Residential Respite Low Care
Priority High
This recommendation requires a delegate decision
Save changes
Return to plans
Save and submit for Delegate decision
Accessibility Privacy Disclaimer Terms of use Copyright
Copyright © Commonwealth of Australia ABN 36 342 015 855


Submit for Delegate decision
You are about to send this support plan to the Delegate for their decision.
Submit
Cancel
Save changes
Return to plans
Save and submit for Delegate decision

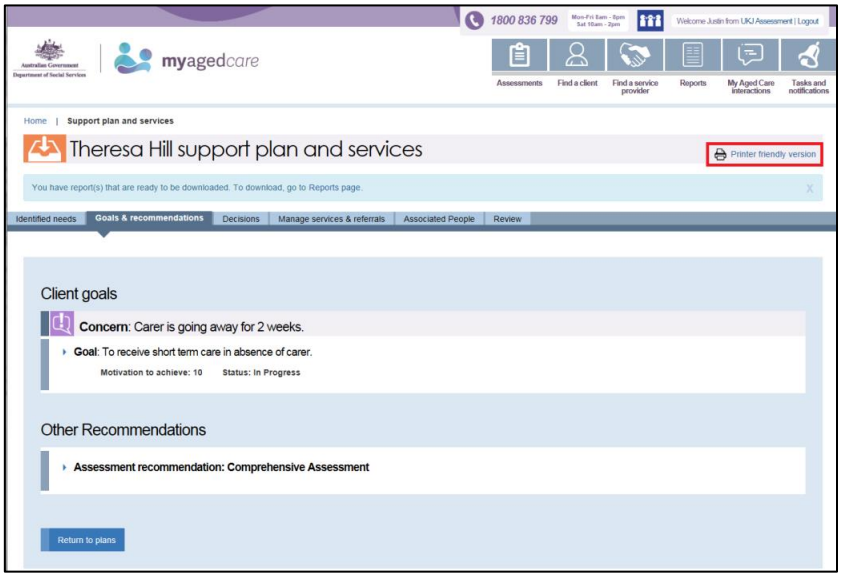
Step Two: You will receive a confirmation message that the support plan has been sent to the Delegate for decision. Any services you recommended as part of the assessment which require approval will have a status of ‘Awaiting Delegate Decision’.


Home | Support plan and services
Theresa Hill support plan and services
Print support plan
• The support plan has been sent to the Delegate for their decision
Identified needs
Goals & recommendations
Decisions
Manage services & referrals
Recommended care requiring delegate decision
Residential Respite Low Care
Priority High
This recommendation is awaiting delegate decision
Save changes
Return to plans

3.6.9 Printing a support plan

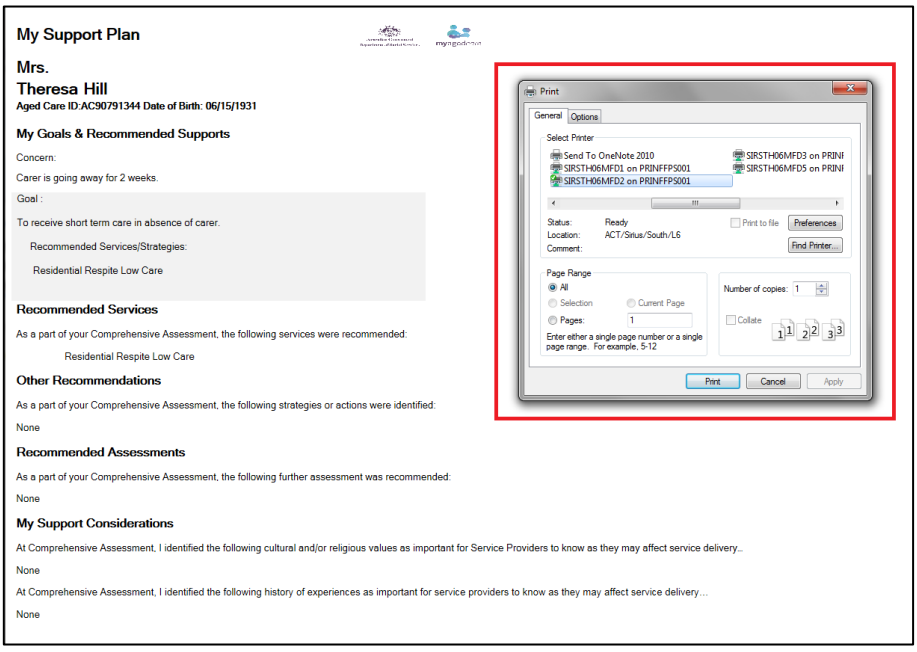
To print a copy of the client's support plan follow the steps below.

Step One: Select 'Printer friendly version'.



Note: You can select 'Printer friendly version' from the 'Identified Needs', 'Goals & recommendations' or 'Manage services and referrals' tabs. The Printer Friendly version includes the information from all three tabs.

Step Two: The printer friendly version of the support plan will be displayed. Select your printer options, and select 'Print'.


My Support Plan
Mrs.
Theresa Hill
Aged Care ID:AC90791344 Date of Birth: 06/15/1931
My Goals & Recommended Supports
Concern:
Carer is going away for 2 weeks.
Goal :
To receive short term care in absence of carer.
Recommended Services/Strategies:
Residential Respite Low Care
Recommended Services
As a part of your Comprehensive Assessment, the following services were recommended:
Residential Respite Low Care
Other Recommendations
As a part of your Comprehensive Assessment, the following strategies or actions were identified:
None
Recommended Assessments
As a part of your Comprehensive Assessment, the following further assessment was recommended:
None
My Support Considerations
At Comprehensive Assessment, I identified the following cultural and/or religious values as important for Service Providers to know as they may affect service delivery...
None
At Comprehensive Assessment, I identified the following history of experiences as important for service providers to know as they may affect service delivery...
None
Print
General
Options
Select Printer
Send To OneNote 2010
SIRSTH06MFD1 on PRINFPS001
SIRSTH06MFD2 on PRINFPS001
SIRSTH06MFD3 on PRINF
SIRSTH06MFD5 on PRINF
Status: Ready
Location: ACT/Sirius/South/L6
Comment:
Print to file
Preferences
Find Printer...
Page Range
All
Selection
Current Page
Pages: 1
Enter either a single page number or a single page range. For example, 5-12
Number of copies: 1
Collate
Print
Cancel
Apply

3.7 Referring clients for services or to waitlist

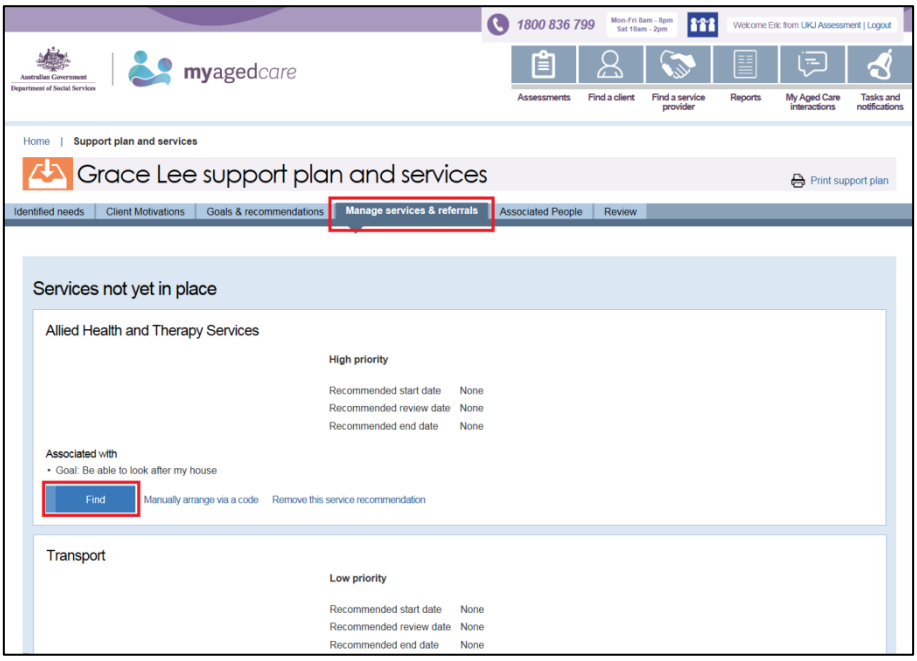
For service recommendations made in the client's support plan, Assessors can search for and match a client to a preferred service provider (or prioritised list of service providers) based on the client's preferred location and/or preferences. The Assessor can send a referral for services, or a referral to waitlist. A client can also be provided with a referral code that allows clients to visit providers prior to selecting their preferred provider.

> You must obtain consent from the client or their representative for a referral to be issued.

To refer clients for service(s) or to waitlists follow the steps below.

3.7.1 Referring to services

Step One: The 'Manage services & referrals' tab will display the recommendations for service(s) in the client's support plan. Select 'Find' for the service that you want to match and refer for.



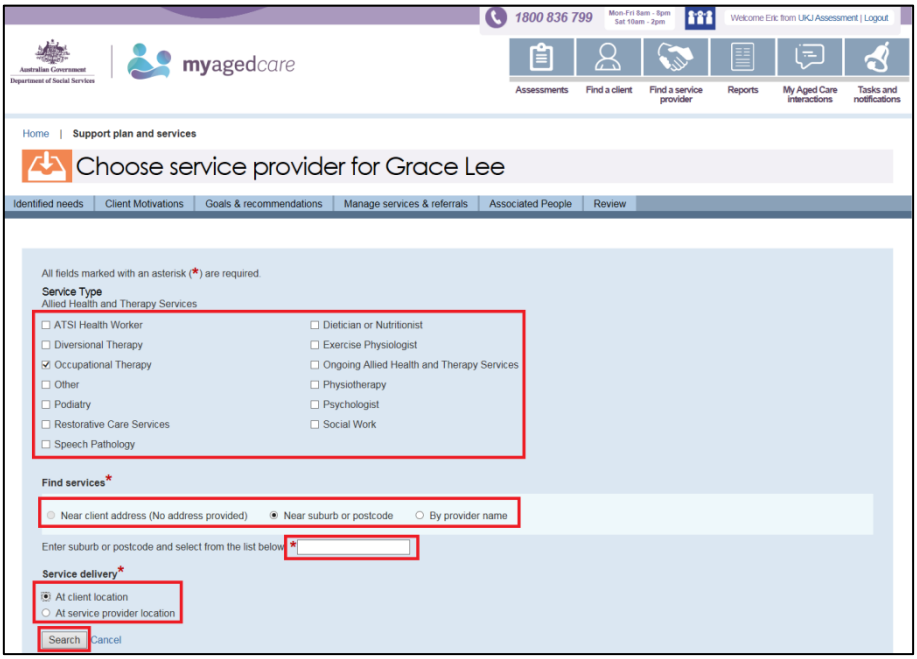
A page will be displayed that allows you to enter search criteria for the service. Search criteria include:

- The list of 'service sub types' that are available for the service selected, to further refine the search for a specific client need
- The client's service delivery address for location based searches
- Preferred service delivery setting: client location or service provider location
- Direct search for service providers by name

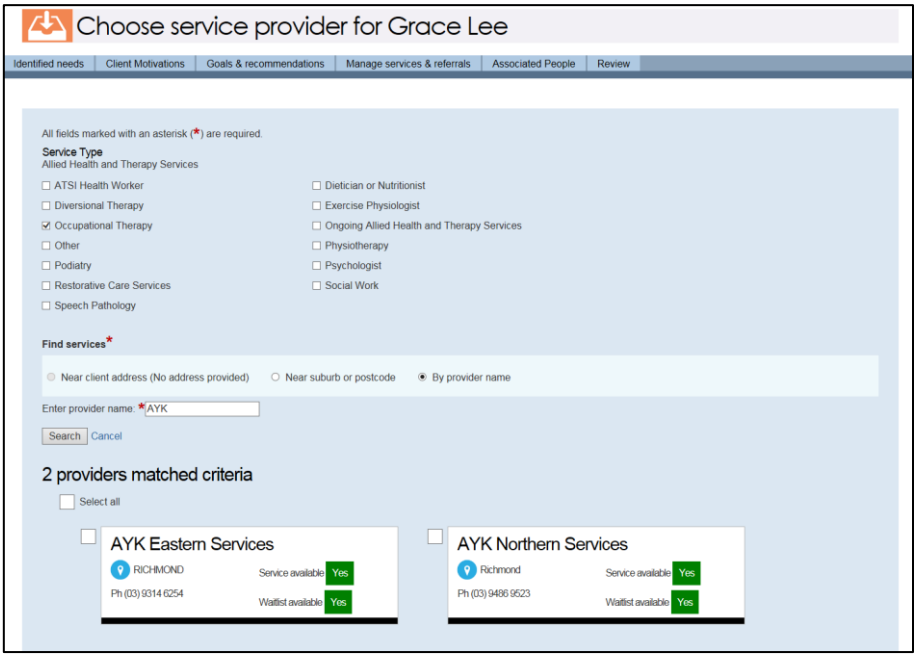
Please note: other search criteria may be available depending on the service selected.

Depending on the service selected, a location search may either be region/area based (e.g. domestic assistance services delivered to the client's home) or proximity based (e.g. Residential Aged Care Facilities).

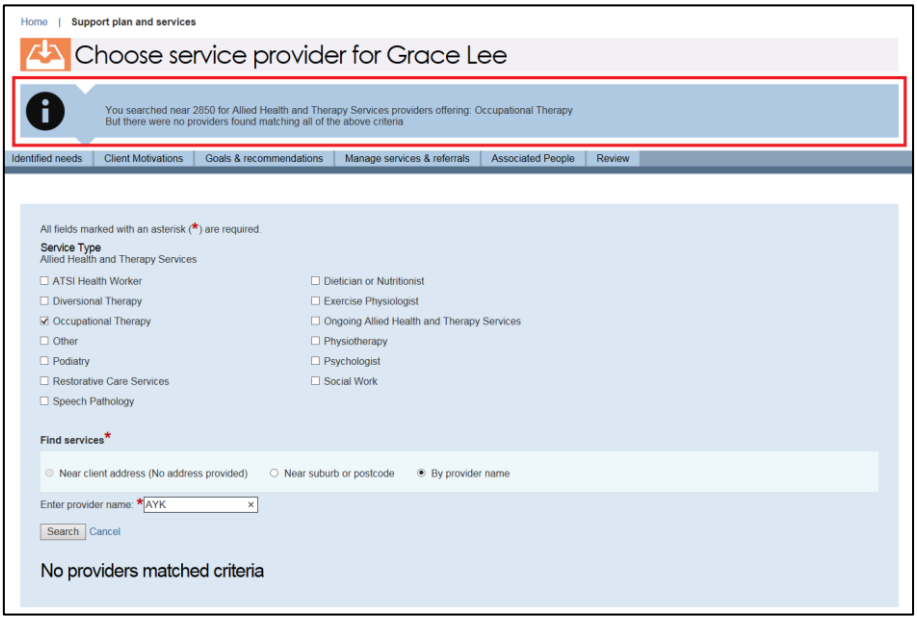
Step Two: Enter search criteria and select 'Search'.



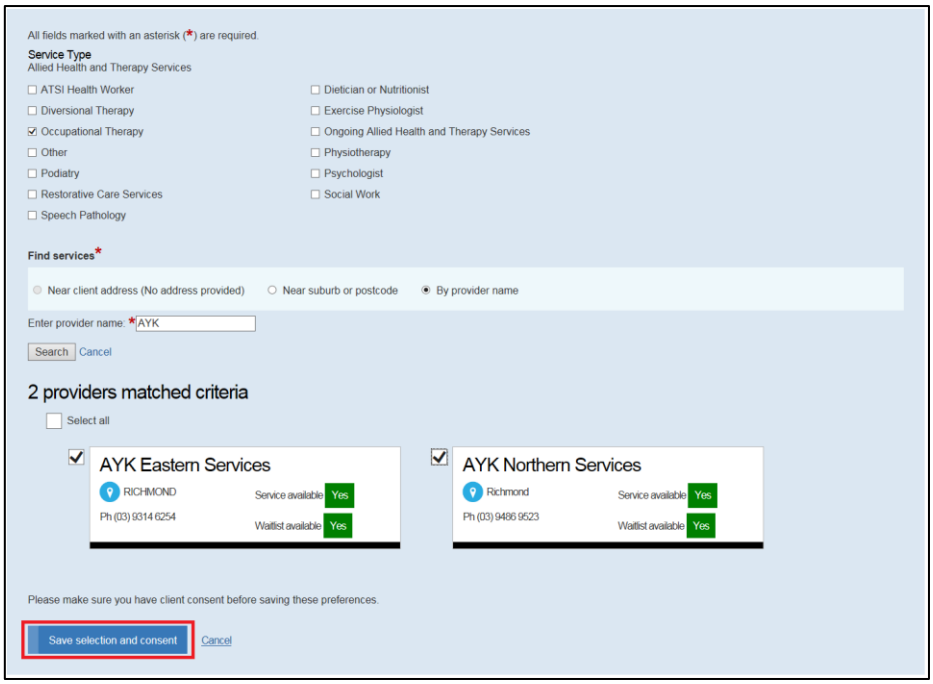
Step Three: View the search results. The search results will be sorted to display the most relevant service providers first, or randomised in the case of equal relevance. The availability of the service and waitlist is displayed for each service provider.



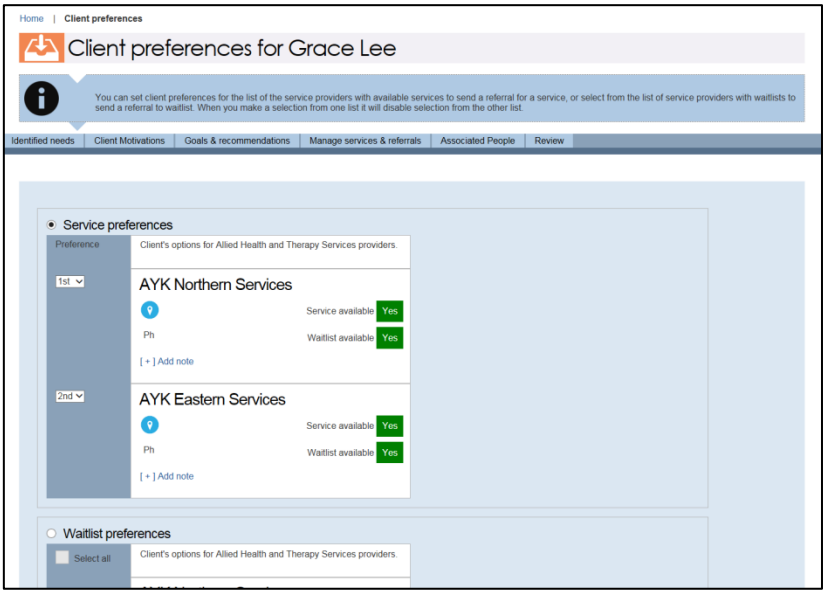
The following message will be displayed if an appropriate service provider is not found.



Step Four: Select the client's preferred service provider(s), ask the client to consent, and select 'Save selection and consent'.



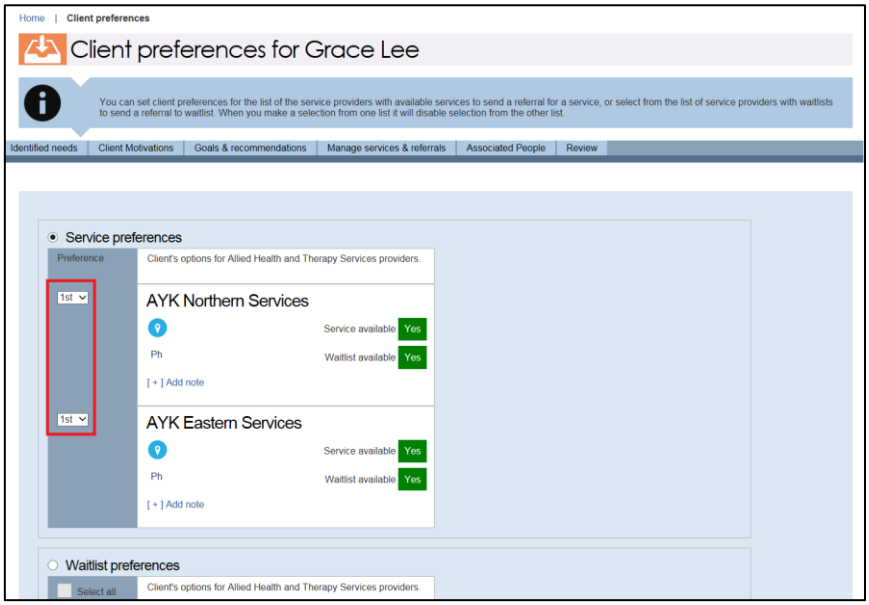
Step Five: Client service and waitlist preferences will be displayed, and assessors may select Service preferences **OR** Waitlist preferences.


Home | Client preferences
Client preferences for Grace Lee
You can set client preferences for the list of the service providers with available services to send a referral for a service, or select from the list of service providers with waitlists to send a referral to waitlist. When you make a selection from one list it will disable selection from the other list.
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Service preferences
Preference
Client's options for Allied Health and Therapy Services providers.
1st
AYK Northern Services
Service available
Yes
Ph
Waitlist available
Yes
[+] Add note
2nd
AYK Eastern Services
Service available
Yes
Ph
Waitlist available
Yes
[+] Add note
Waitlist preferences
Select all
Client's options for Allied Health and Therapy Services providers.

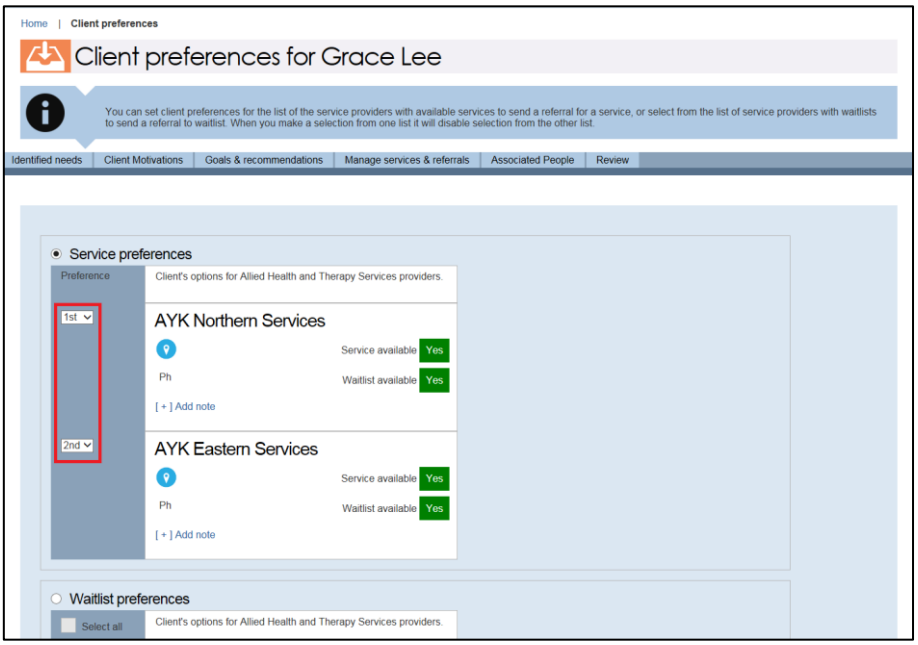
For referrals sent individually in order of the client's preference, the client will not be contacted to reconfirm consent for issuing a referral to the next preferred service provider.

Step Six: Enter the preferences for issuing referrals and select 'Save preferences'.

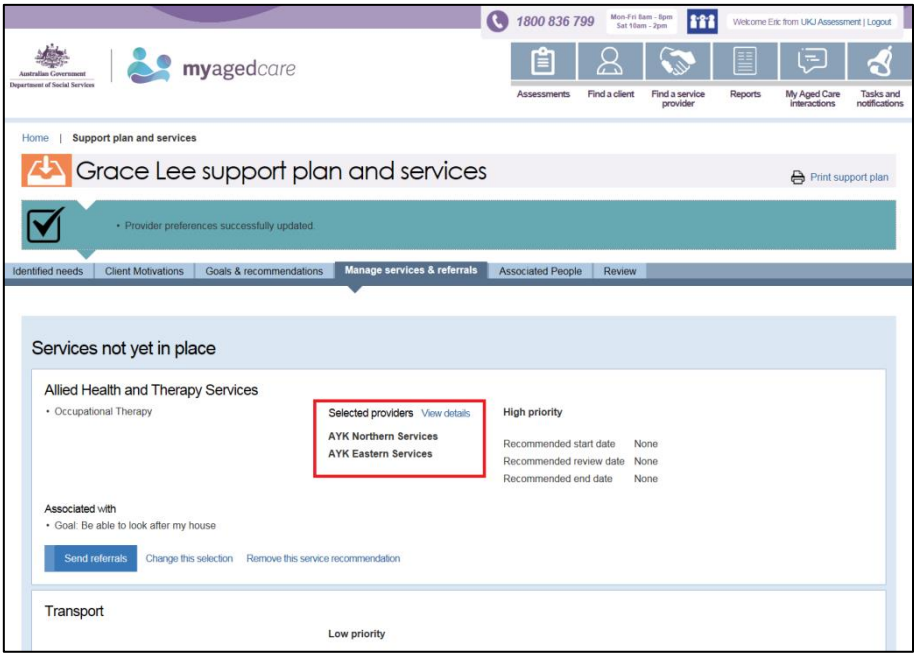
- For an electronic referral broadcast to all service providers referral, set priority of all service providers to '1st'


Home | Client preferences
Client preferences for Grace Lee
You can set client preferences for the list of the service providers with available services to send a referral for a service, or select from the list of service providers with waitlists to send a referral to waitlist. When you make a selection from one list it will disable selection from the other list.
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Service preferences
Preference
Client's options for Allied Health and Therapy Services providers.
1st
AYK Northern Services
Service available
Yes
Ph
Waitlist available
Yes
[+] Add note
1st
AYK Eastern Services
Service available
Yes
Ph
Waitlist available
Yes
[+] Add note
Waitlist preferences
Select all
Client's options for Allied Health and Therapy Services providers.

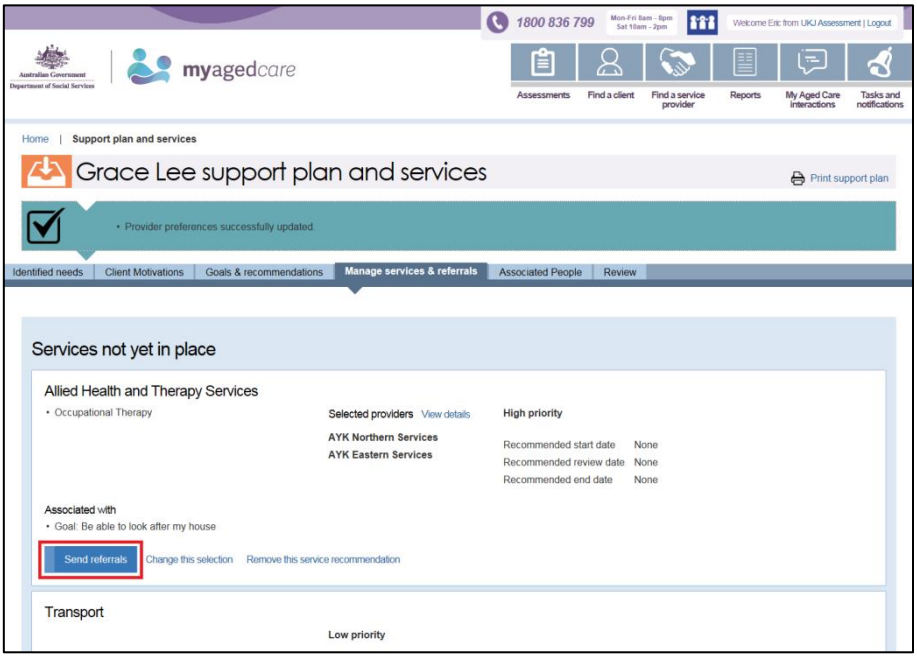
- For an electronic referral in order of client preference, set priority of service providers in order of the client's preference.


Home | Client preferences
Client preferences for Grace Lee
You can set client preferences for the list of the service providers with available services to send a referral for a service, or select from the list of service providers with waitlists to send a referral to waitlist. When you make a selection from one list it will disable selection from the other list.
Identified needs
Client Motivations
Goals & recommendations
Manage services & referrals
Associated People
Review
Service preferences
Preference
Client's options for Allied Health and Therapy Services providers.
1st
2nd
AYK Northern Services
Service available
Yes
Ph
Waitlist available
Yes
[+] Add note
AYK Eastern Services
Service available
Yes
Ph
Waitlist available
Yes
[+] Add note
Waitlist preferences
Select all
Client's options for Allied Health and Therapy Services providers.

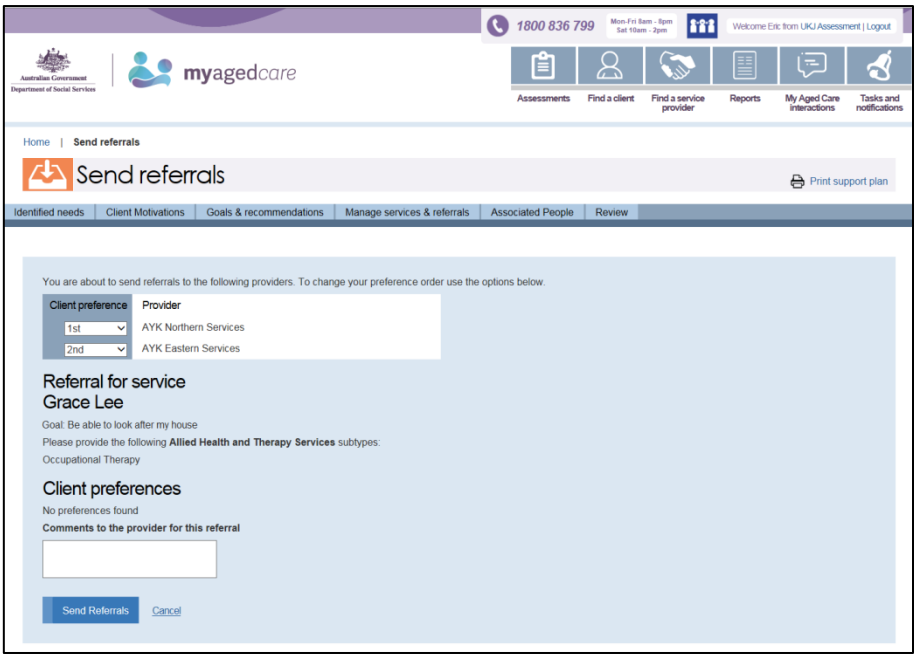
The 'Manage services & referrals' tab is displayed with the selected service provider(s) saved against the service. Select the 'View details' link to view the details of the service providers.



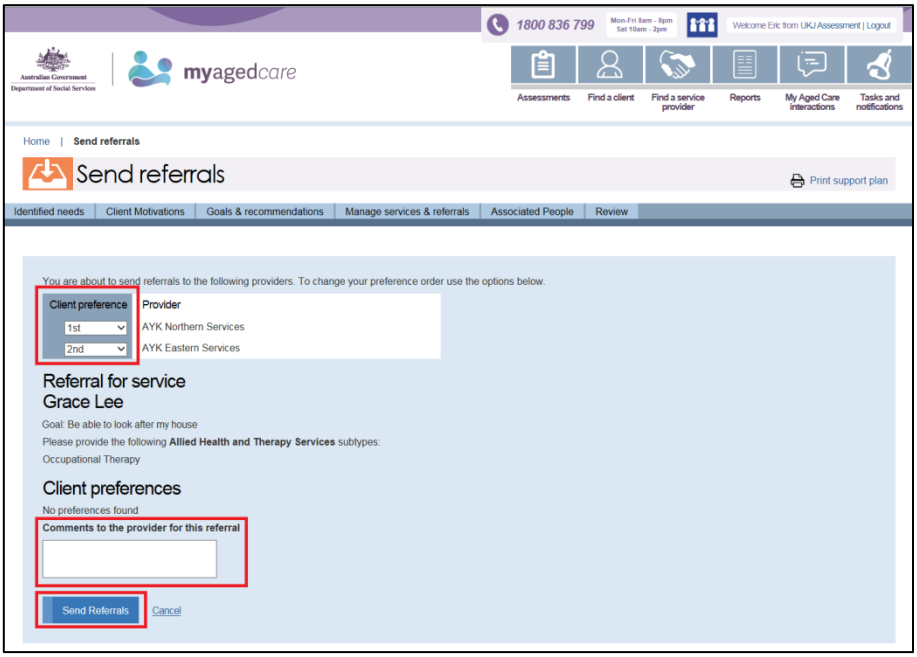
Step Seven: To issue electronic referrals, select ‘Send referrals’.



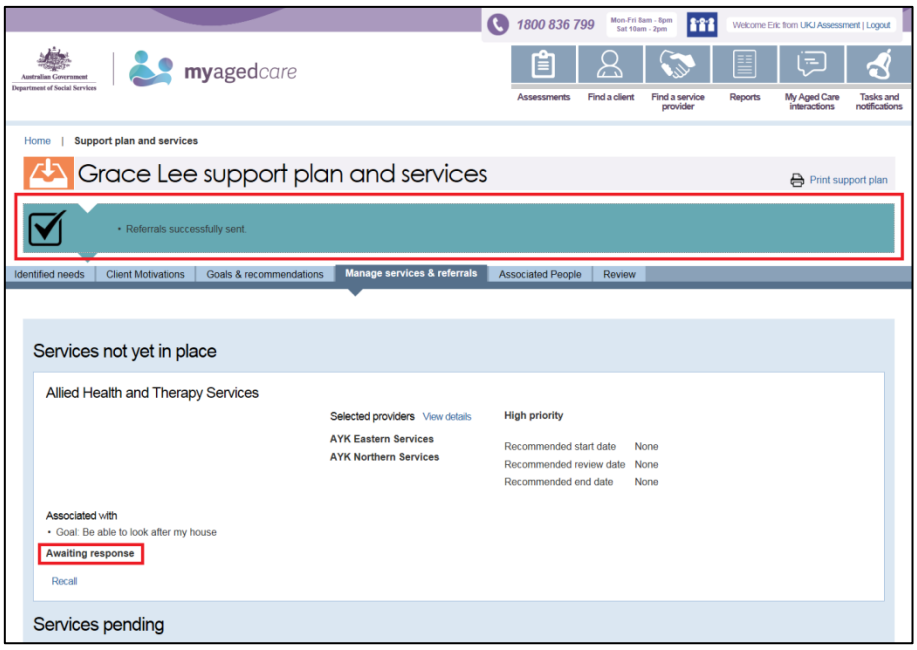
A page will be displayed that allows you to review preferences and capture any other information relevant to the service provider prior to issuing the referrals.



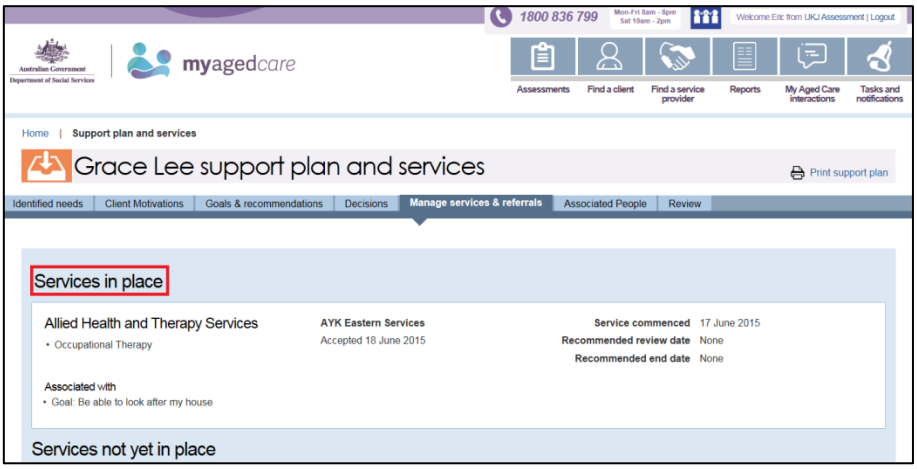
Step Eight: Review preferences, record comments for the service provider (optional) and select ‘Send Referrals’.



Step Nine: You will receive a confirmation message that referrals have been sent. The current status of the referral(s) is visible on the support plan.



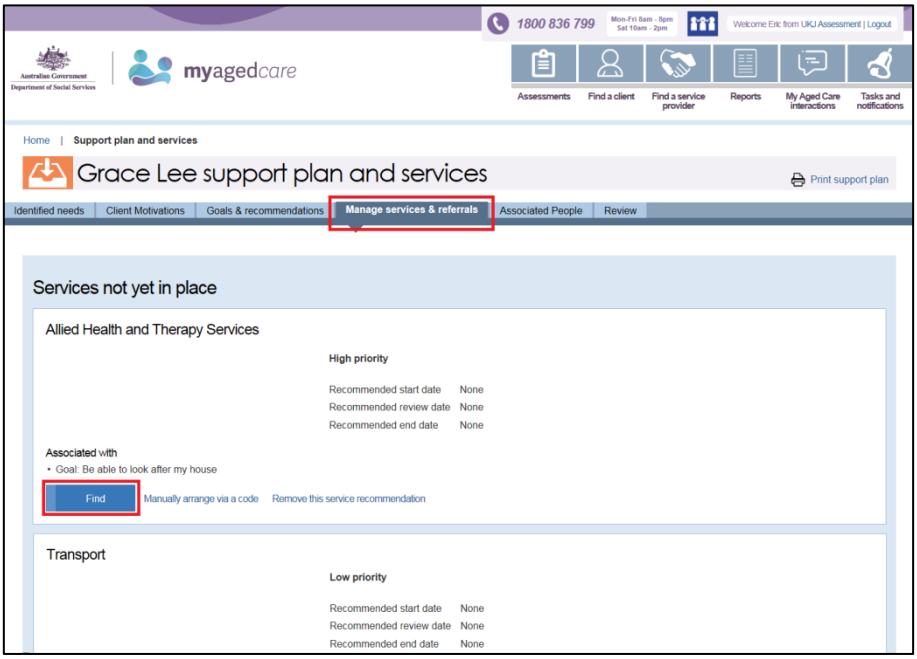
Step Ten: Once the referral has been accepted by a service provider, the service will be displayed under the ‘Services in place’.



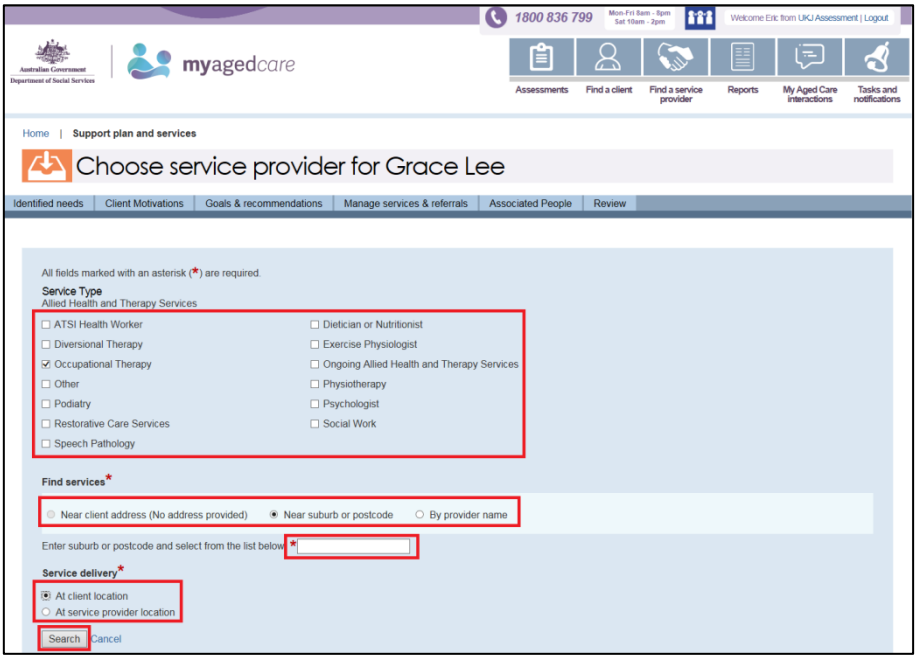
Once all referrals have been issued, you should proceed to finalise the support plan and assessment by following the steps outlined in Section 3.6.6.

3.7.2 Sending referrals to waitlist

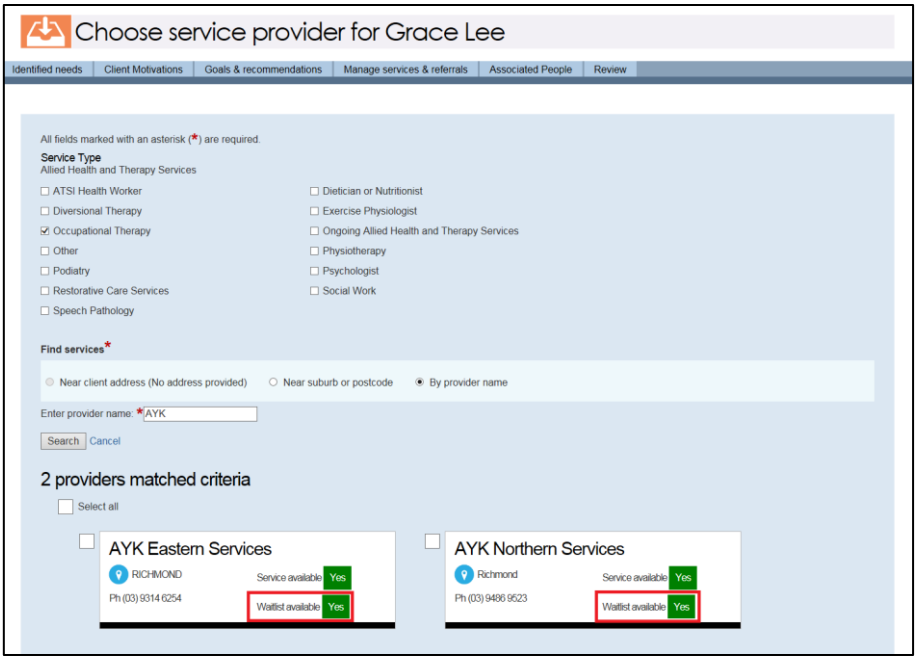
Step One: Under the 'Manage services & referrals' tab, select 'Find' for the service that you want to match and refer for.



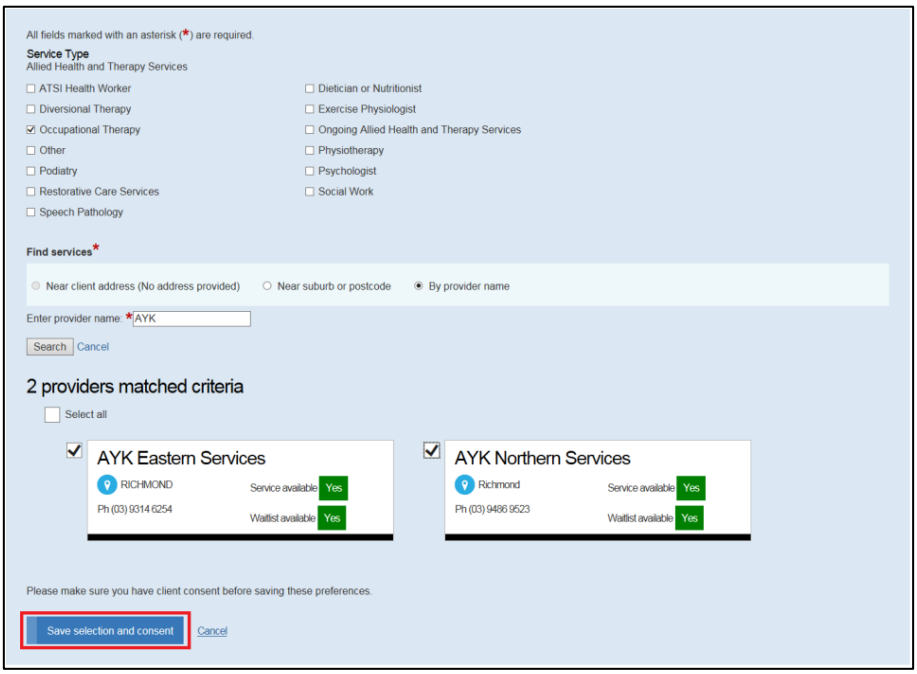
Step Two: Enter search criteria and select 'Search'.



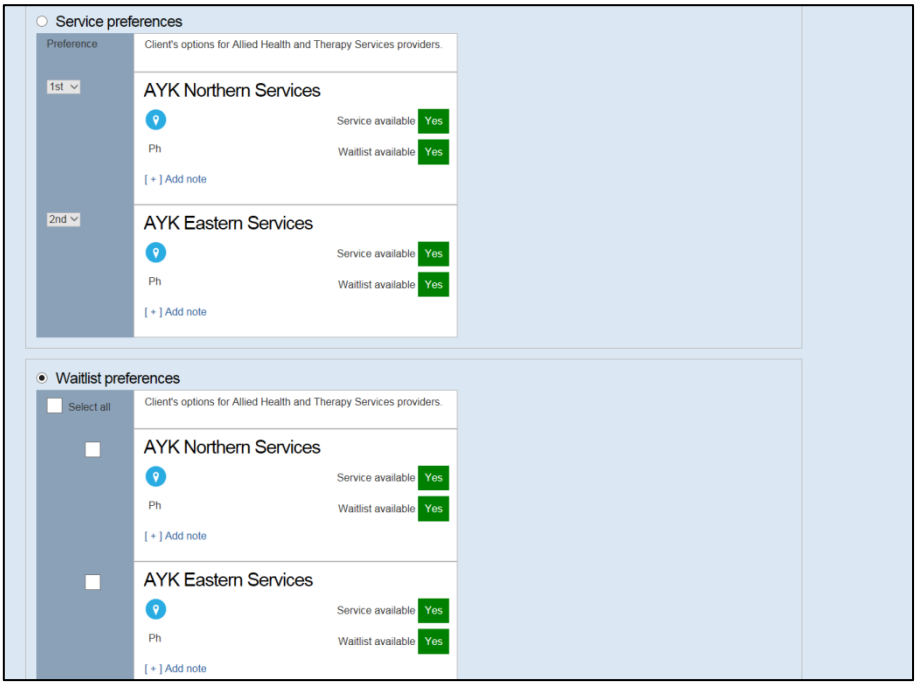
View the search results. The search results will be sorted to display the most relevant service providers first, or randomised in the case of equal relevance. The availability of the service and waitlist is displayed for each service provider.



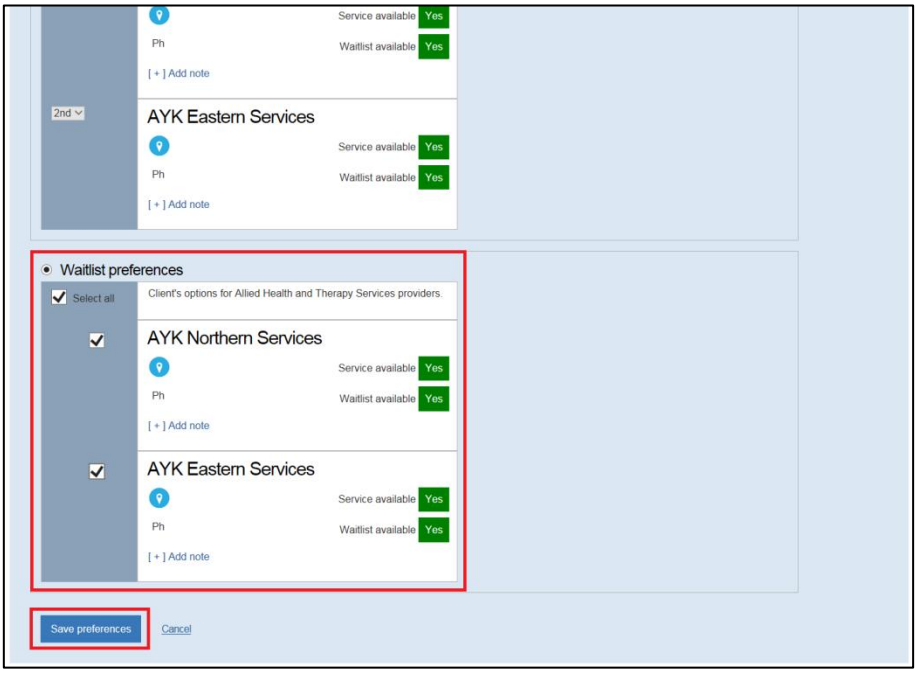
Step Three: Select the client's preferred service provider(s), ask the client to consent, and select 'Save selection and consent'.



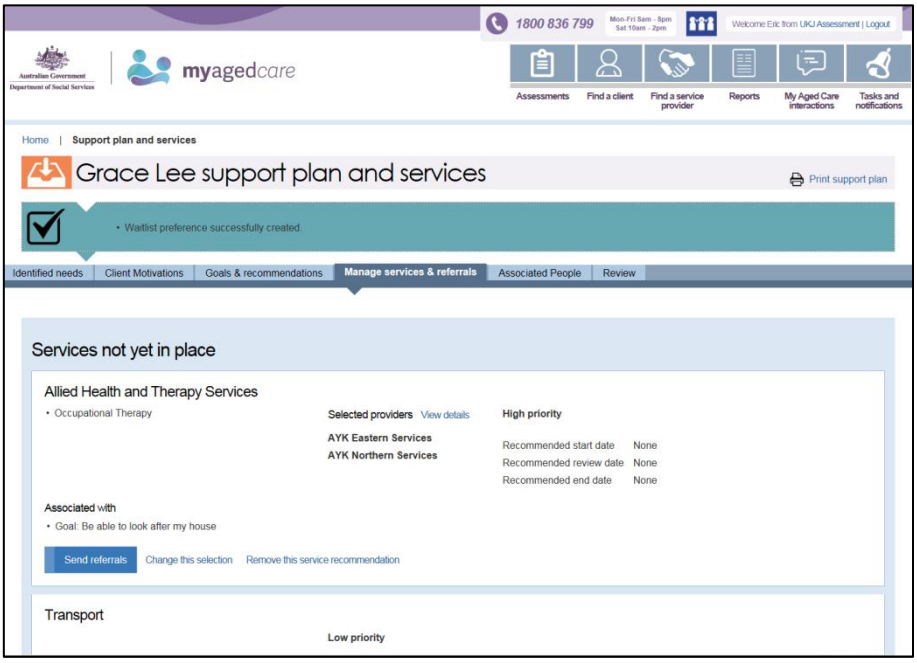
Step Four: Client service and waitlist preferences will be displayed, and assessors may select Service preferences **OR** Waitlist preferences.



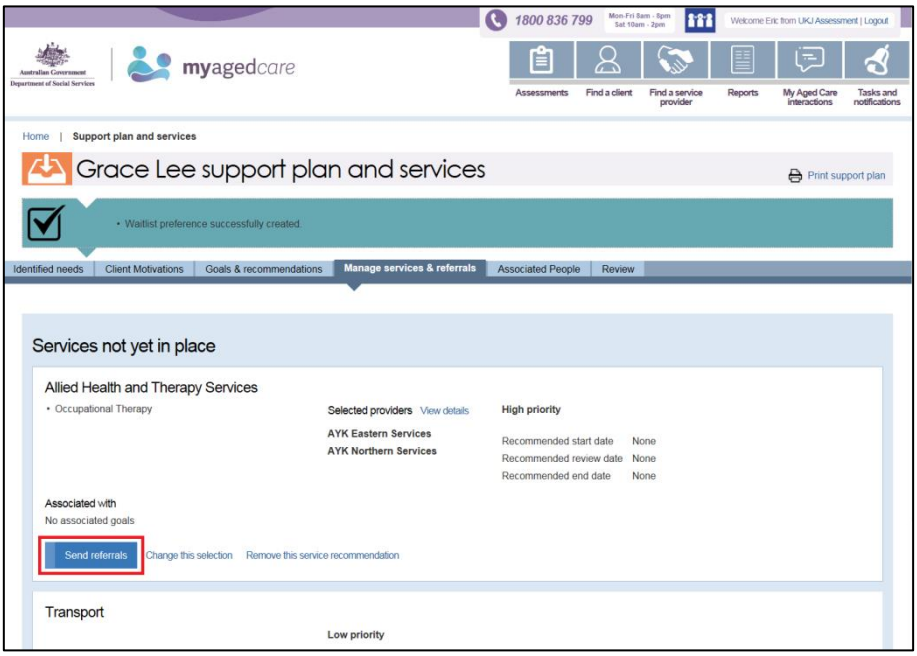
Step Five: Select which provider(s) to send the referral to waitlist for. Select 'Save preferences'.



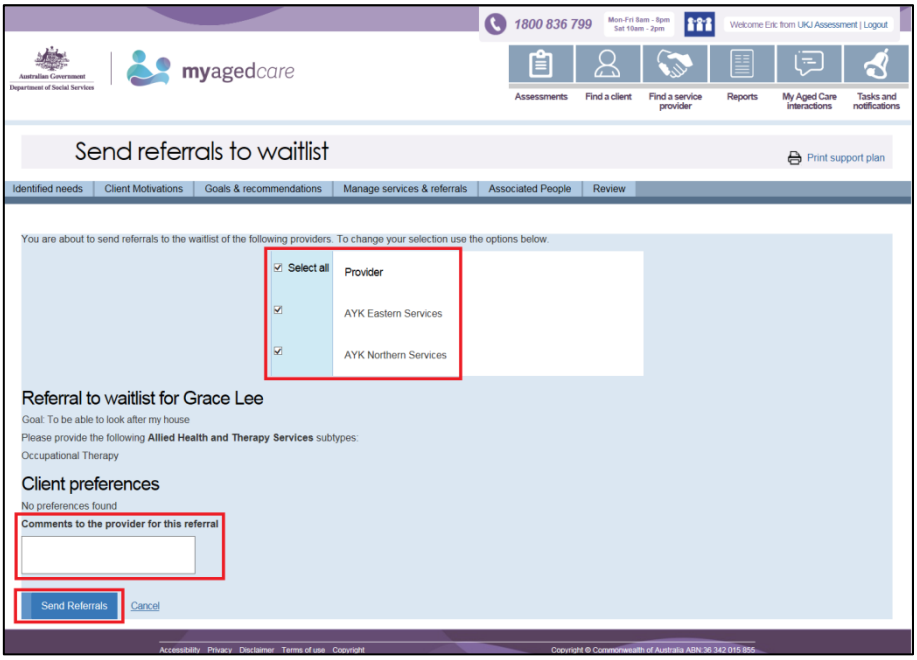
The ‘Manage services & referrals’ tab will display the updated preferences.



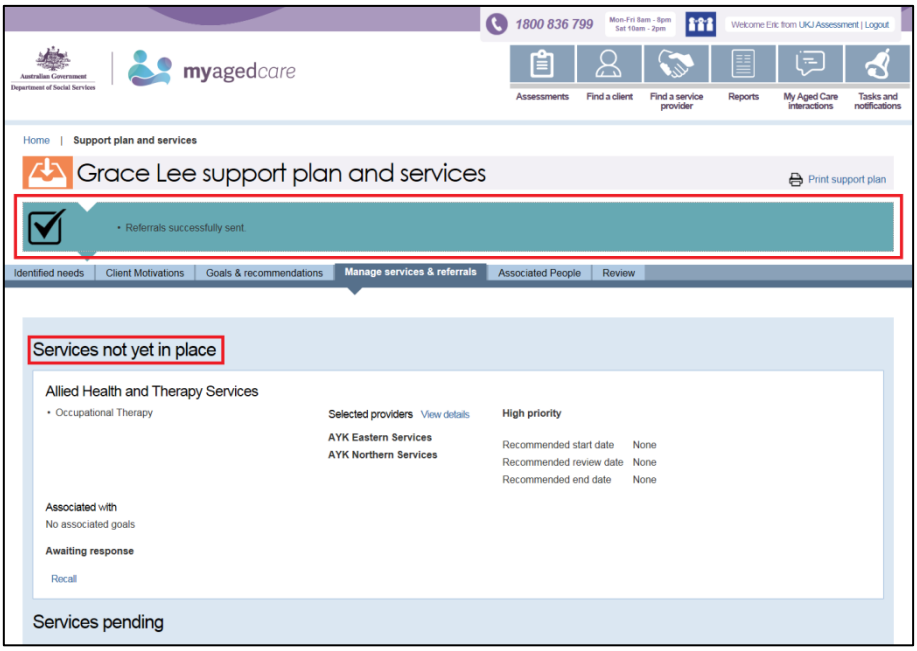
Step Six: To send the referrals to waitlist select ‘Send referrals’.



Step Seven: Review preferences, record comments for the service provider (optional) and select ‘Send Referrals’.



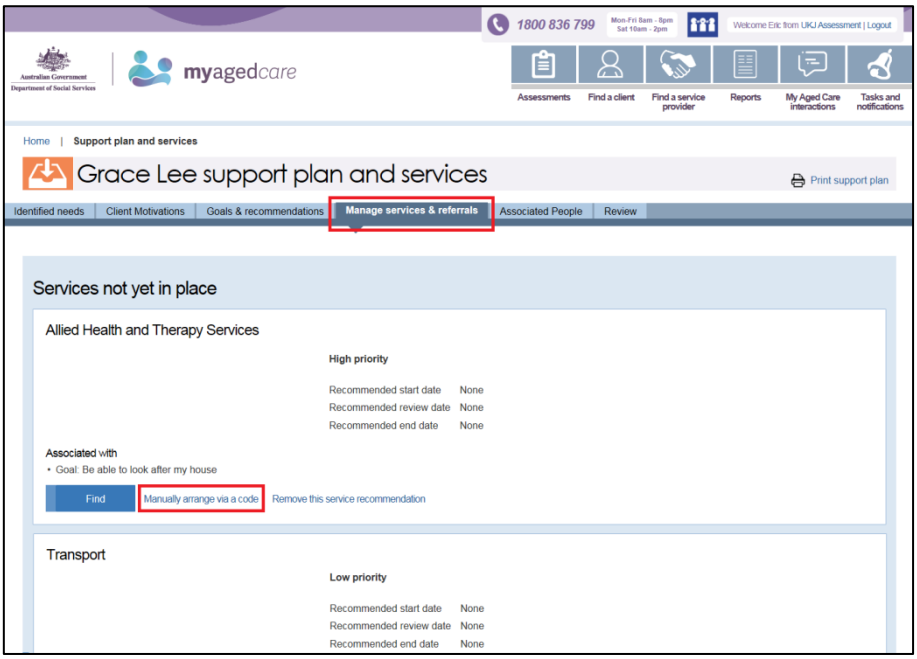
A confirmation page will display and the waitlisted service will appear under ‘Services not yet in place’ until the service provider accepts the client for waitlist.



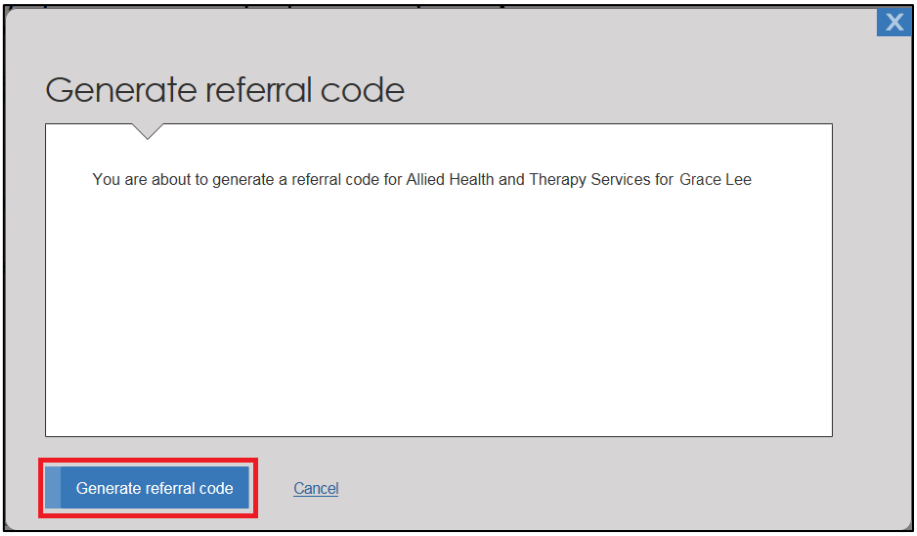
3.7.3 Generating a referral code

To generate a referral code for a service follow the steps below.

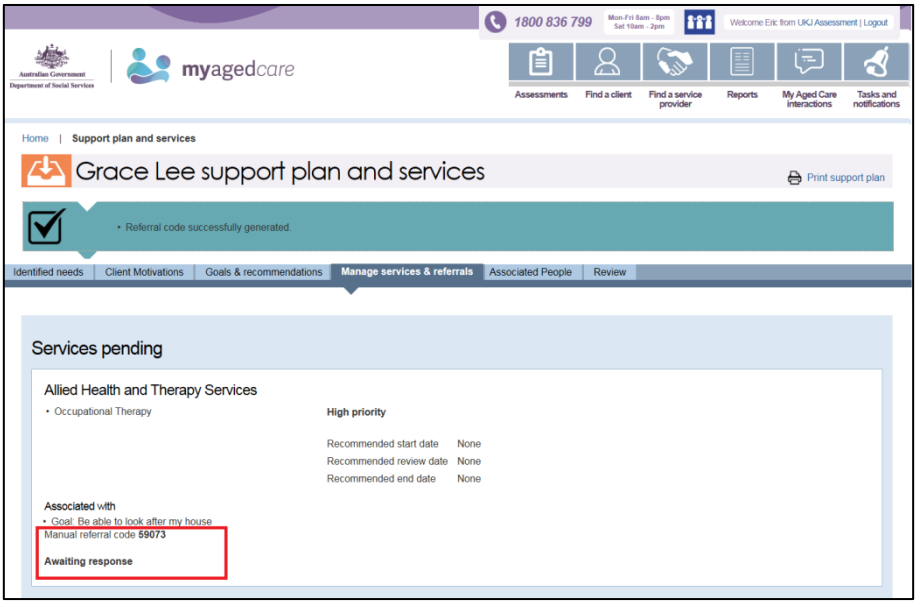
Step One: On the 'Manage services & referrals tab', select the 'Manually arrange via a code' link for the service.



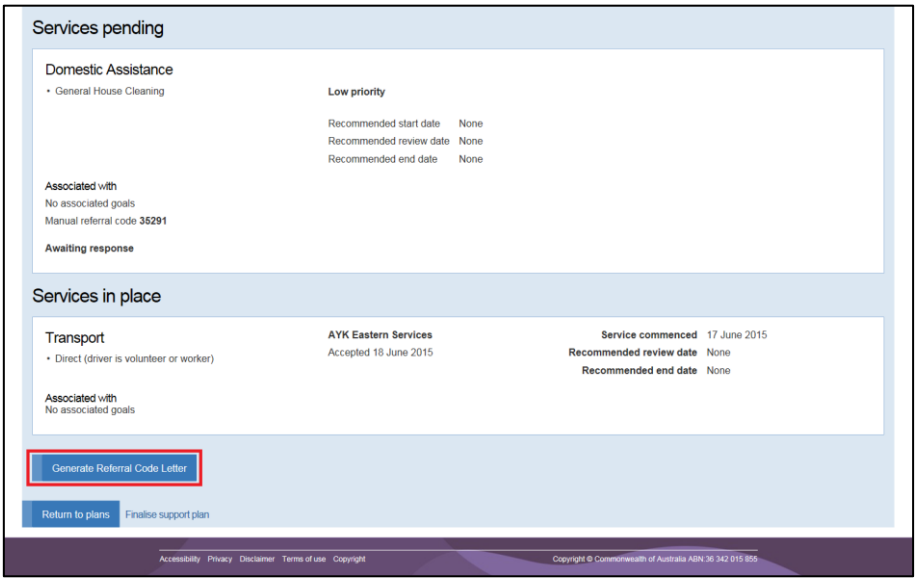
Step Two: A confirmation message will be displayed. Select 'Generate referral code'.


Generate referral code
You are about to generate a referral code for Allied Health and Therapy Services for Grace Lee
Generate referral code
Cancel

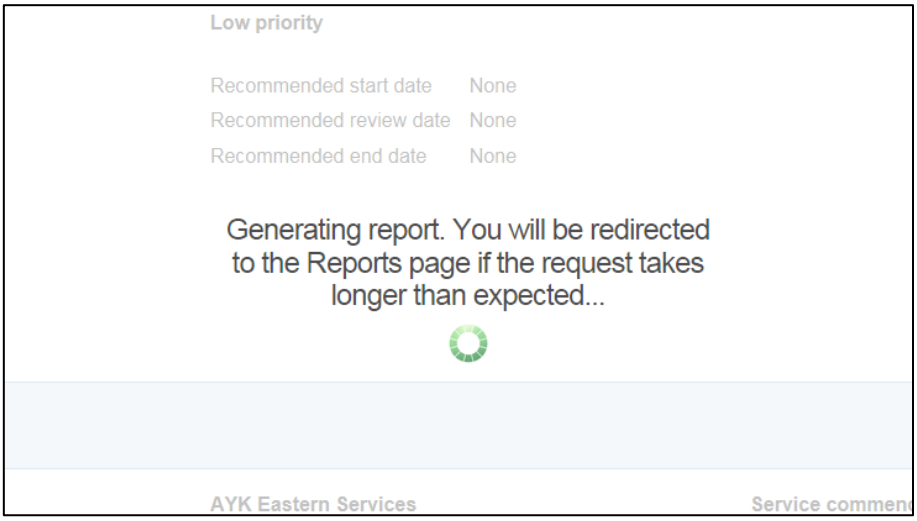
Step Three: You will receive a confirmation message that the referral code has been generated, and it will appear under 'Services pending.' The referral code will be displayed on the referral. You can provide this code verbally to the client, or print a copy of the code.



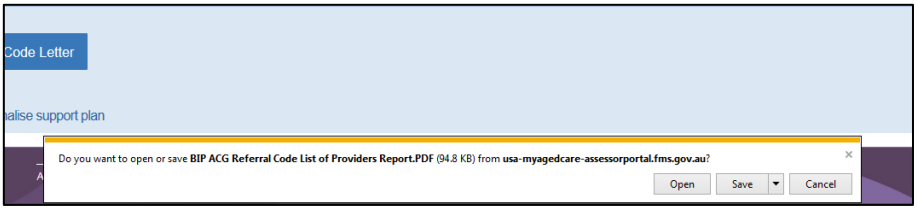
Step Four: To generate a letter with the code for the client, select 'Generate Referral Code Letter'.

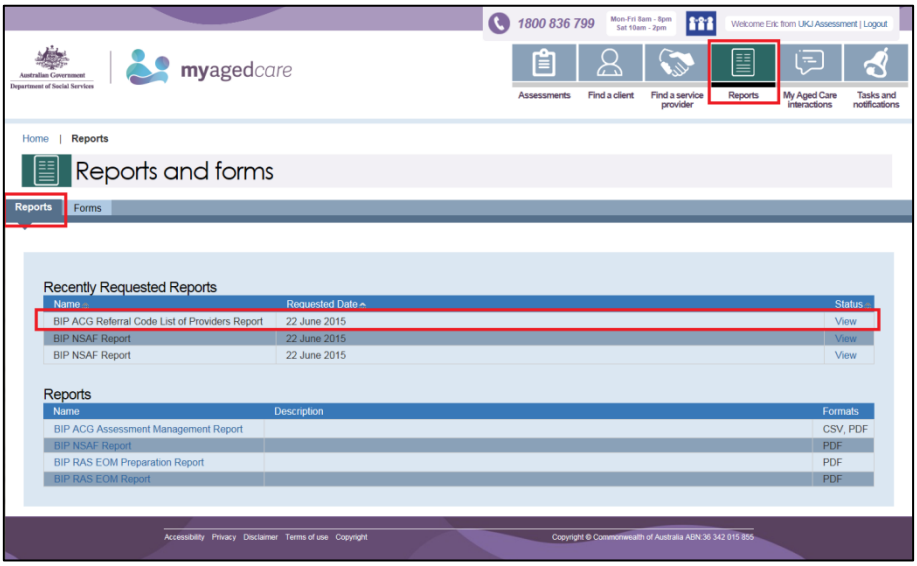


The letter will generate as a report. If the request takes longer than expected, it will appear in the ‘Reports’ tab.


Low priority
Recommended start date None
Recommended review date None
Recommended end date None
Generating report. You will be redirected to the Reports page if the request takes longer than expected...
AYK Eastern Services
Service commenc

Step Five: You will have the option to ‘Open’ or ‘Save’ the report, or view the letter in the ‘Reports’ tab.


Code Letter
ialise support plan
Do you want to open or save BIP ACG Referral Code List of Providers Report.PDF (94.8 KB) from usa-myagedcare-assessorportal.fms.gov.au?
Open
Save
Cancel

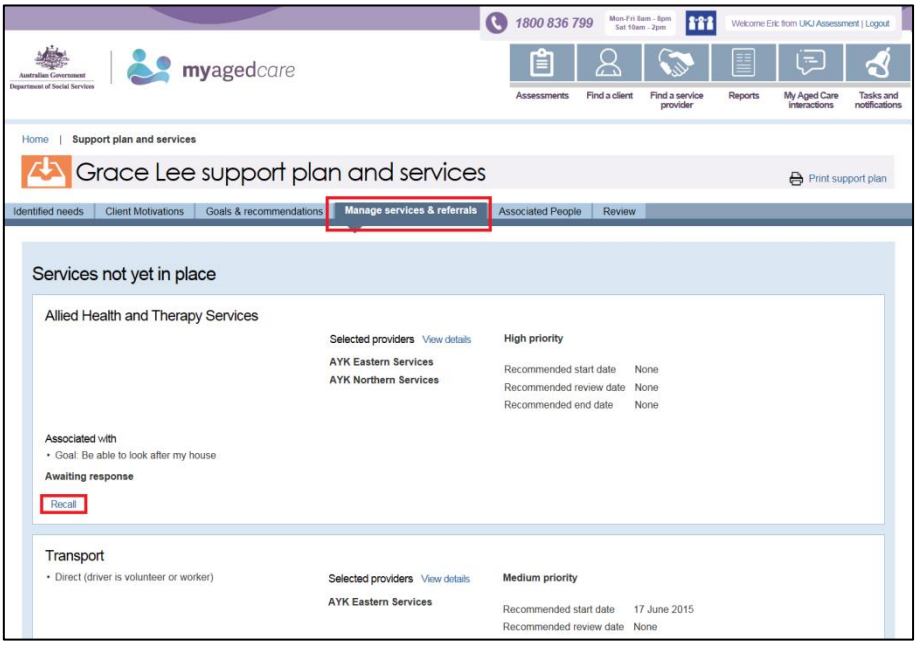


3.7.4 Recalling a referral

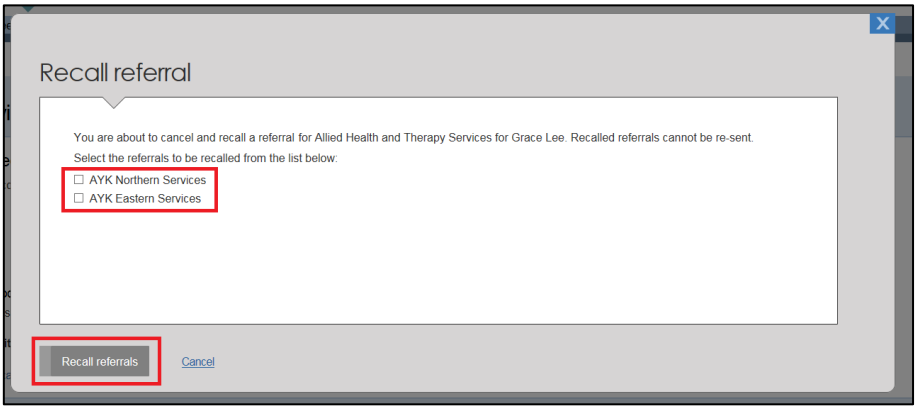
When a referral for service is issued, it is expected that the service provider will action the referral by accepting or rejecting it. The Assessor can recall the referral before the service provider actions it.

To recall a referral follow the steps below.

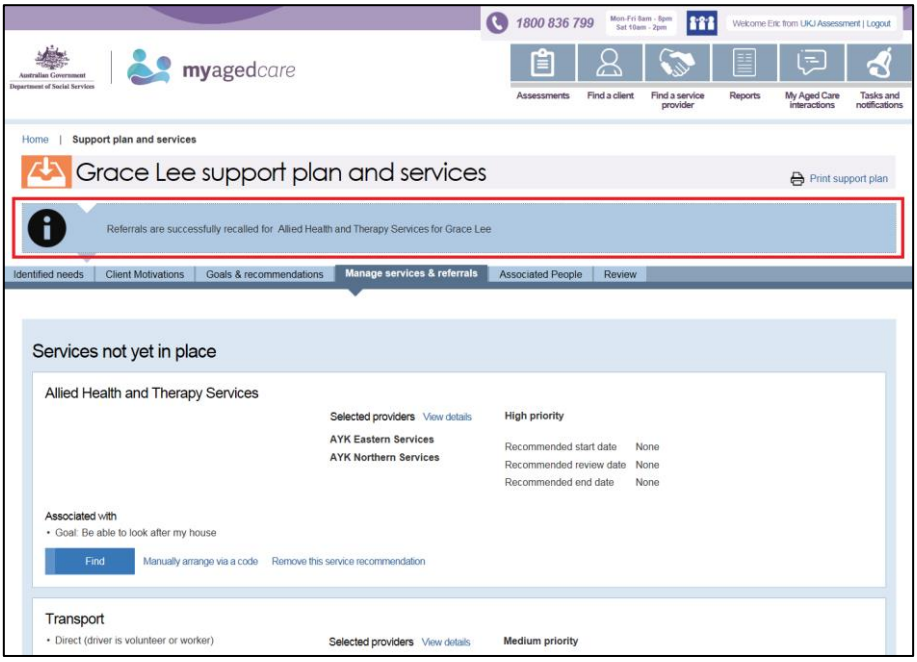
Step One: On the 'Manage services & referrals tab', select the 'Recall' link for the referral to be recalled.



Step Two: A confirmation message will be displayed. Select 'Recall referrals'.


Recall referral
You are about to cancel and recall a referral for Allied Health and Therapy Services for Grace Lee. Recalled referrals cannot be re-sent.
Select the referrals to be recalled from the list below:
AYK Northern Services
AYK Eastern Services
Recall referrals
Cancel

Step Three: You will receive a confirmation message that the referral(s) have been recalled.

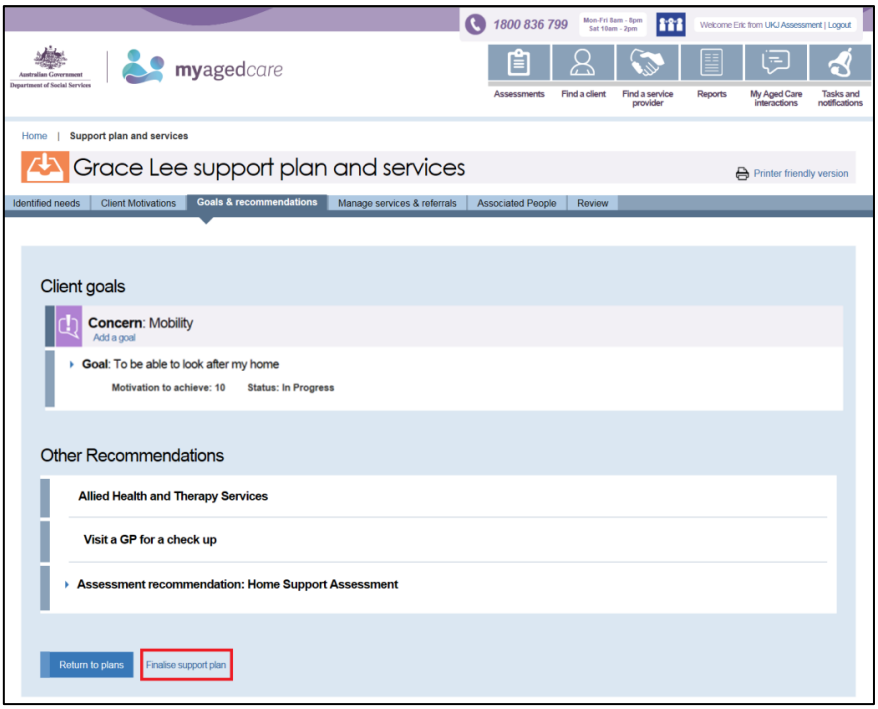


3.8 Finalising the assessment

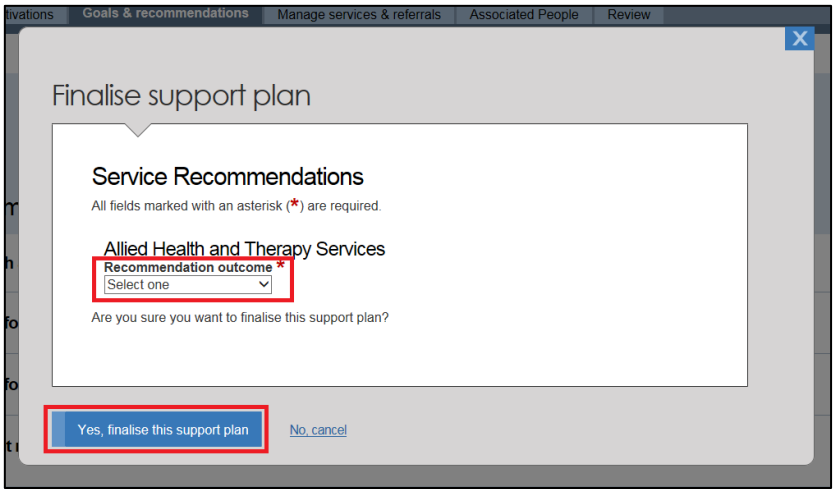
When you have completed the NSAF, completed the support plan, referred clients for any services required (noting Delegate approval may have been required prior to referrals being issued), and reached the point of effective referral, you should finalise the assessment.

To finalise the assessment, follow the steps below:

Step One: Select 'Finalise support plan' on any of the tabs in the support plan page.



Step Two: A pop up box will be displayed. You will need to record an outcome against each recommended service to indicate the status of each service.



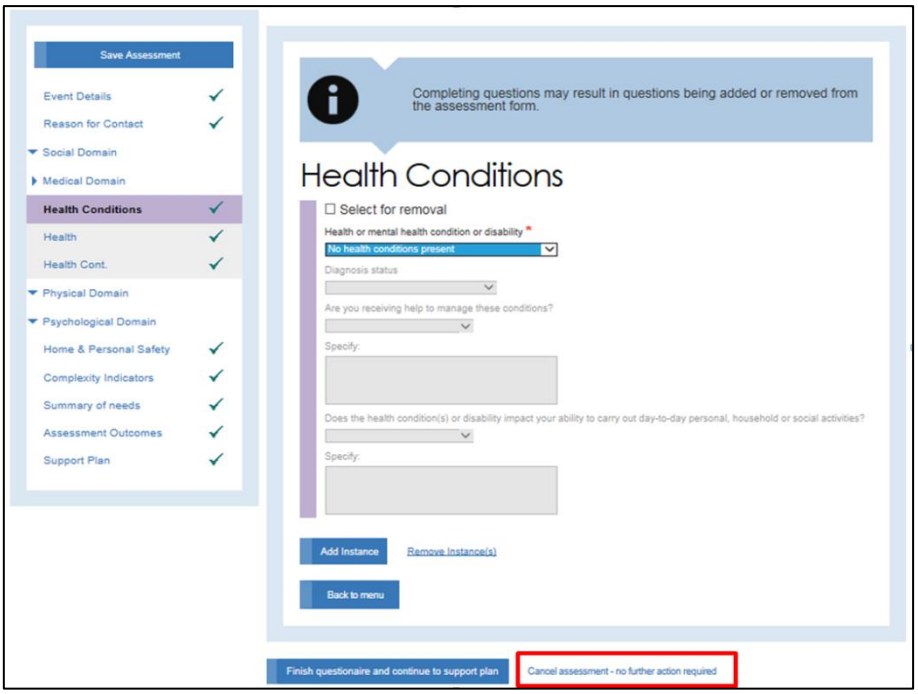
Where it is not actioned, you will need to record a reason. When you have completed the required field, select 'Finalise this support plan'.

3.9 Cancelling an assessment

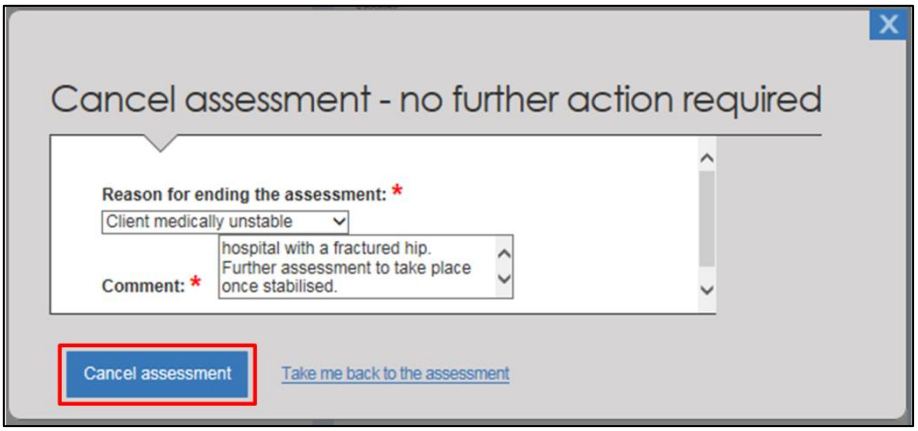
You should only cancel an assessment if you have not conducted an assessment. If you have conducted an assessment, you will need to record as much information as you can in the NSAF and mark the assessment as complete.

In order to cancel an assessment follow the steps outlined below.

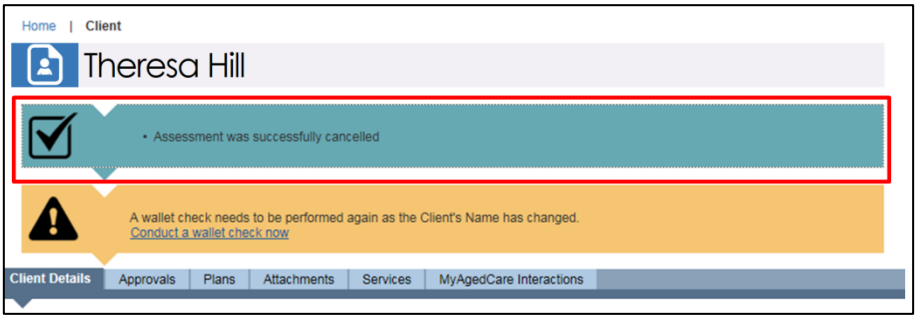
Step One: Select 'Cancel assessment- no further action required' in the NSAF.



Step Two: You will need to record the reason for ending the assessment, and add a comment, and then select 'Cancel Assessment'.


Cancel assessment - no further action required
Reason for ending the assessment: *
Client medically unstable
Comment: *
hospital with a fractured hip. Further assessment to take place once stabilised.
Cancel assessment
Take me back to the assessment

Step Three: You will receive a confirmation message that the assessment has been cancelled.



Delegate

4 Delegate role

People who perform the Delegate role need to be assigned the Delegate role in the assessor portal.

Delegates will use the assessor portal to:

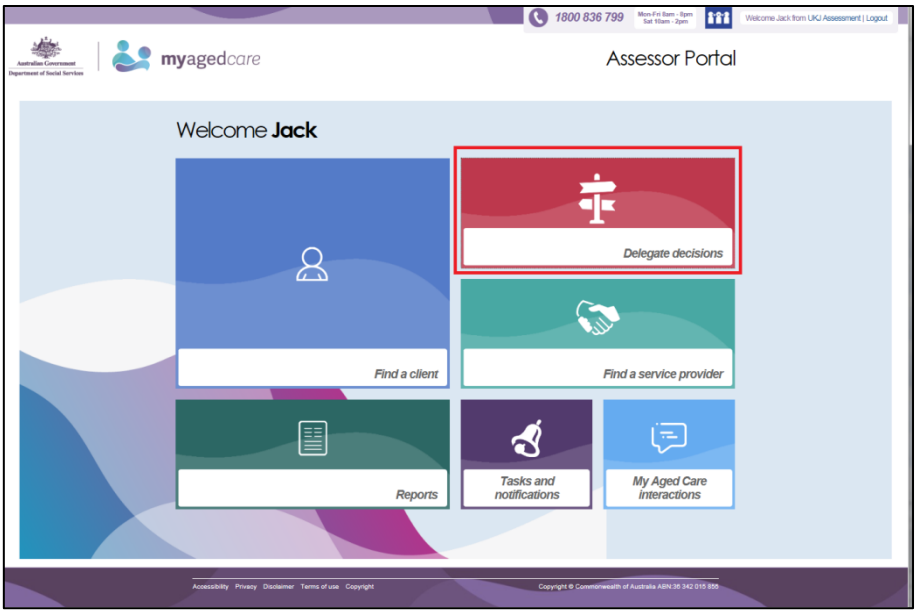
- Assign items for decisions
- Decide whether to approve or not approve a client for care types under the Act, after a comprehensive assessment
- Request corrections to care approval decisions
- Decide whether to approve requests for care extensions.

In order to make a decision on a given item in the queue, you must assign the item to yourself.

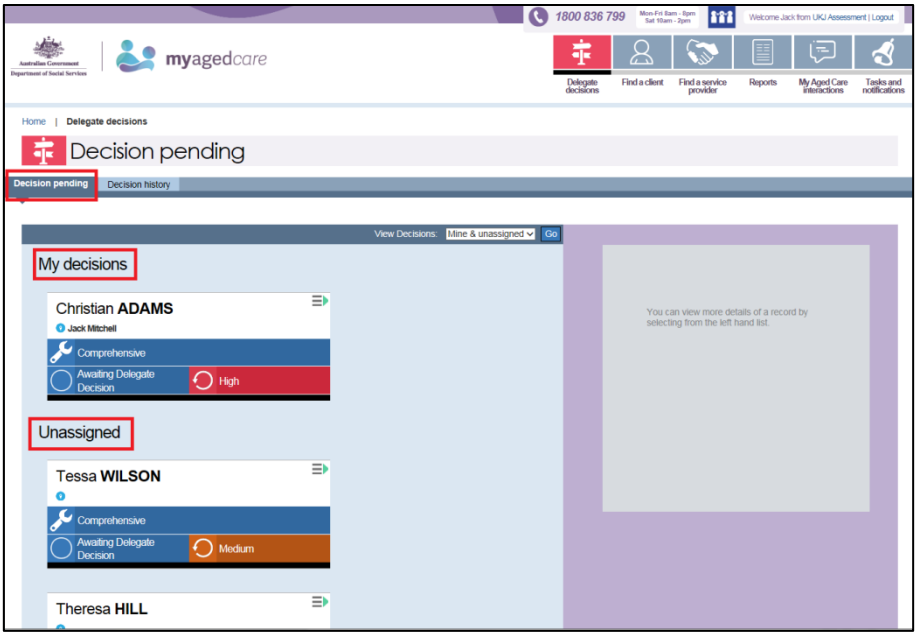
4.1 Assigning item for decision

To assign items for decision follow the steps outlined below.

Step One: Select 'Delegate Decisions' on the homepage.

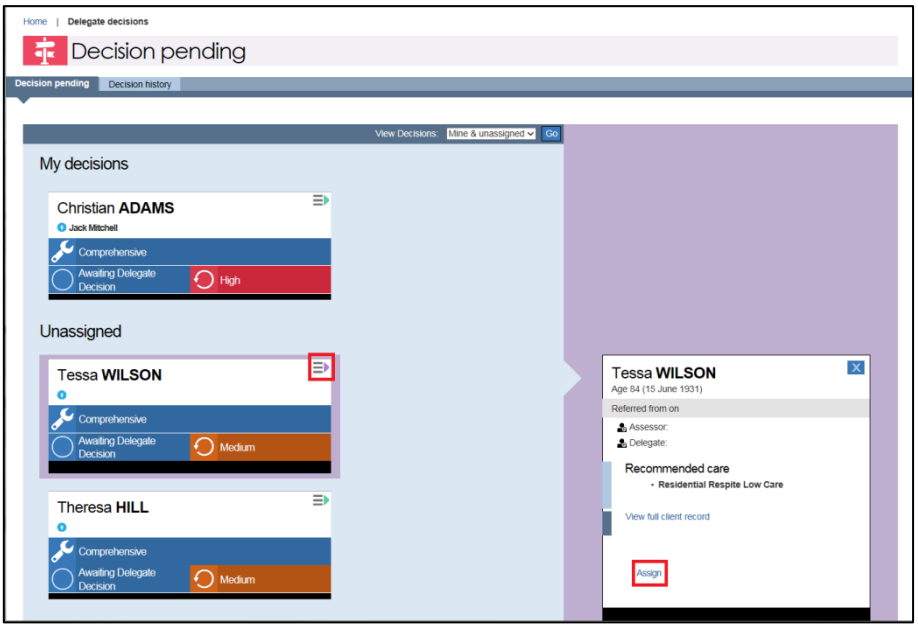


Step Two: You will be directed to the Delegate queues. There are two tabs: 'Decisions pending' and 'Decision history'. Select the 'Decision pending' tab. This will display the list of items which require decision by a Delegate.

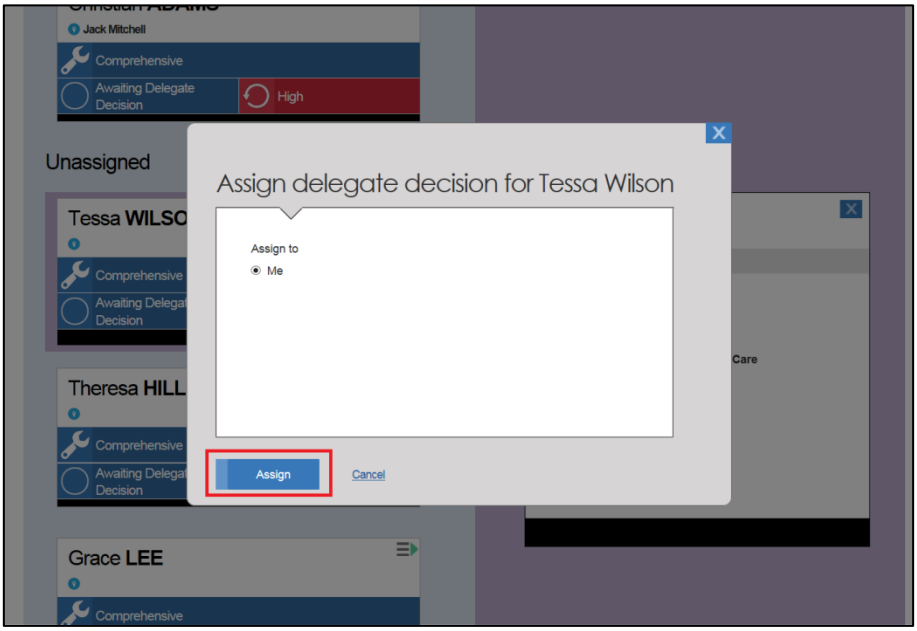


You can sort the items in the queue to view the items you are assigned or those which have not yet been assigned using the drop down menu at the top of the queue.

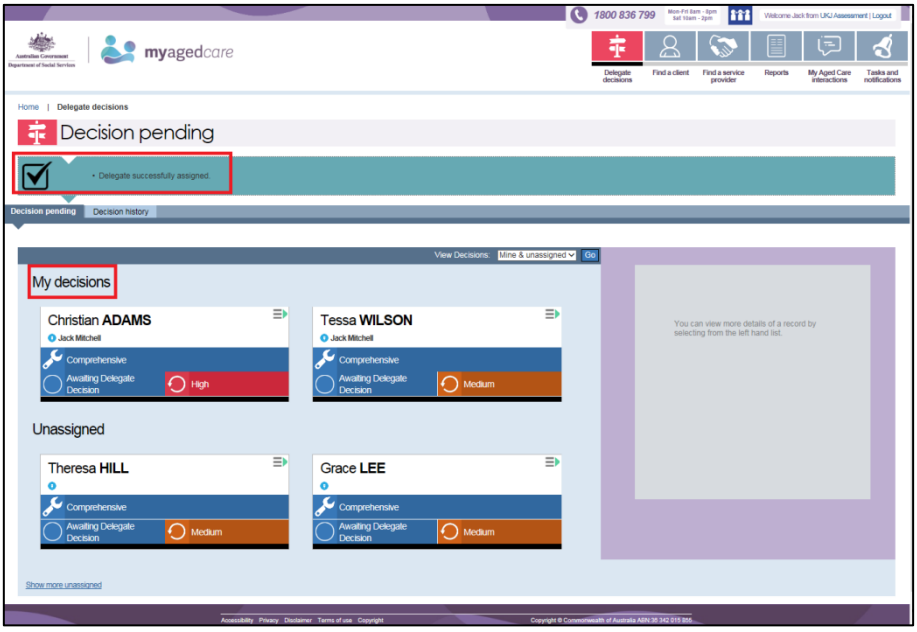
Step Three: Select the arrow on the 'Client card' to display a summary of the client's information on the right hand side of the page. Select 'Assign' to allocate that item to yourself or another Delegate within the team.



Step Four: Select a Delegate, and select 'Assign'.



Step Five: You will receive a confirmation message to say that the queue item has been assigned and it will now appear under the Delegate's name. In the example below, the Delegate allocated the item to themselves.

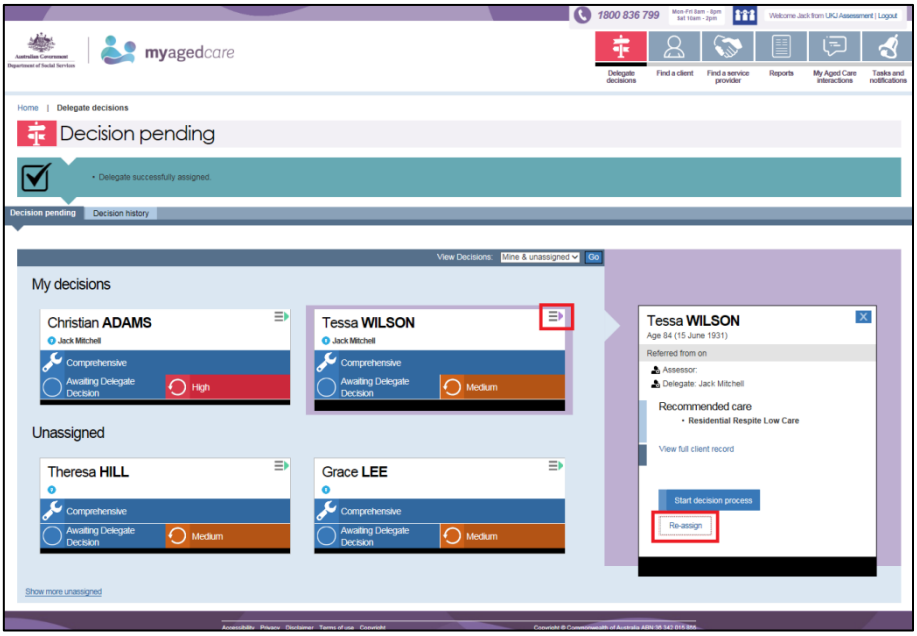


4.2 Reassigning/Unassigning item for Delegation

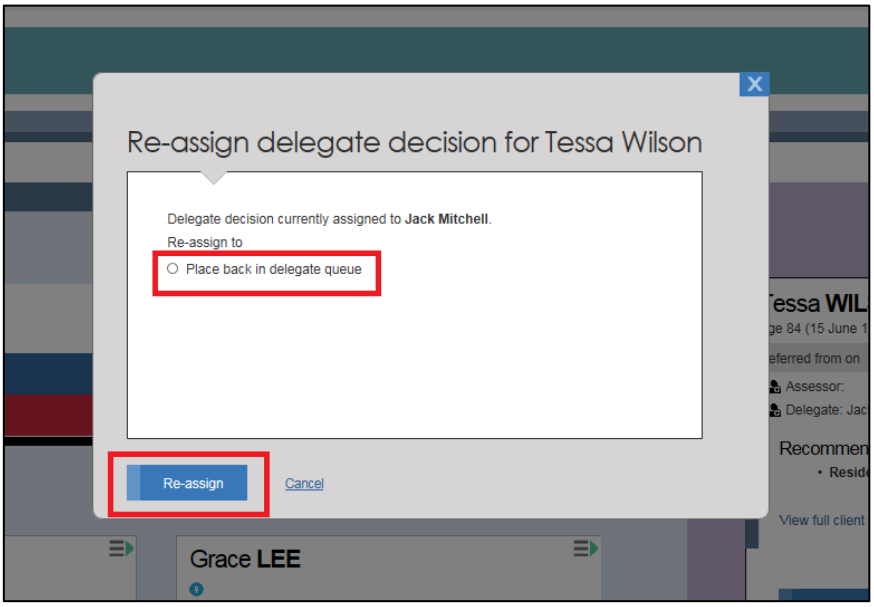
In the event that a Delegate has assigned themselves an item, but they are unable to complete it, they can reassign it to another Delegate or unassign a Delegate.

To reassign or unassign a Delegate follow the steps below.

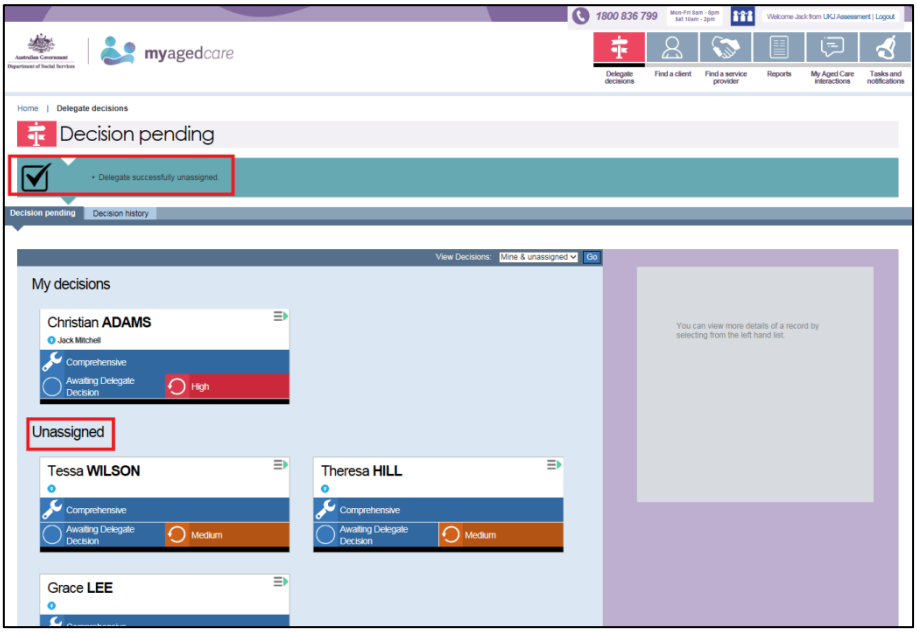
Step One: Select the arrow on the 'Client card' to display a summary of the client's information on the right hand side of the page. Select 'Reassign'.



Step Two: Nominate another Delegate to assign the item to, or select the option 'Place back in delegate queue' if you want to unassign it. Select 'Reassign'.



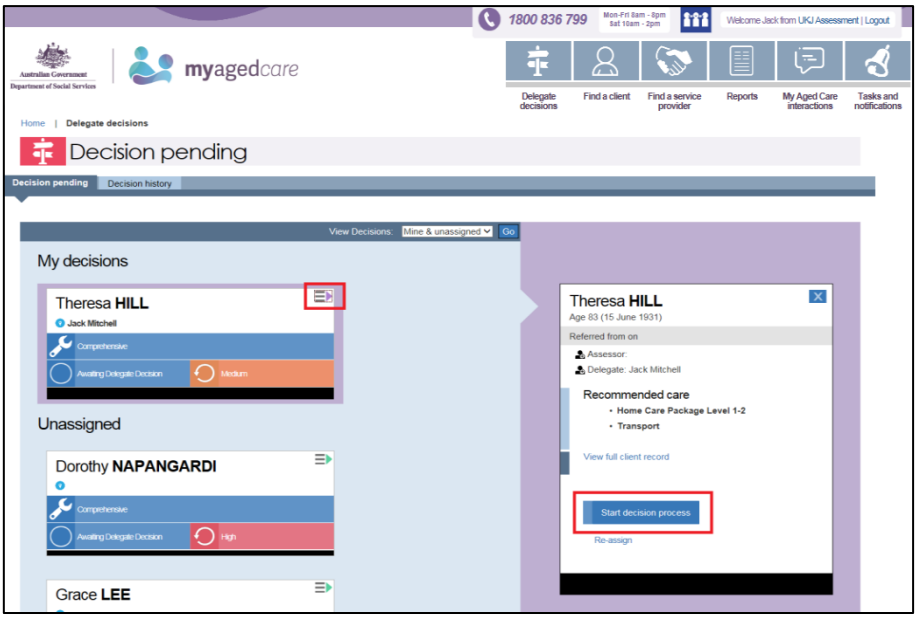
Step Three: You will receive a confirmation message that you have either reassigned or unassigned the queue item.



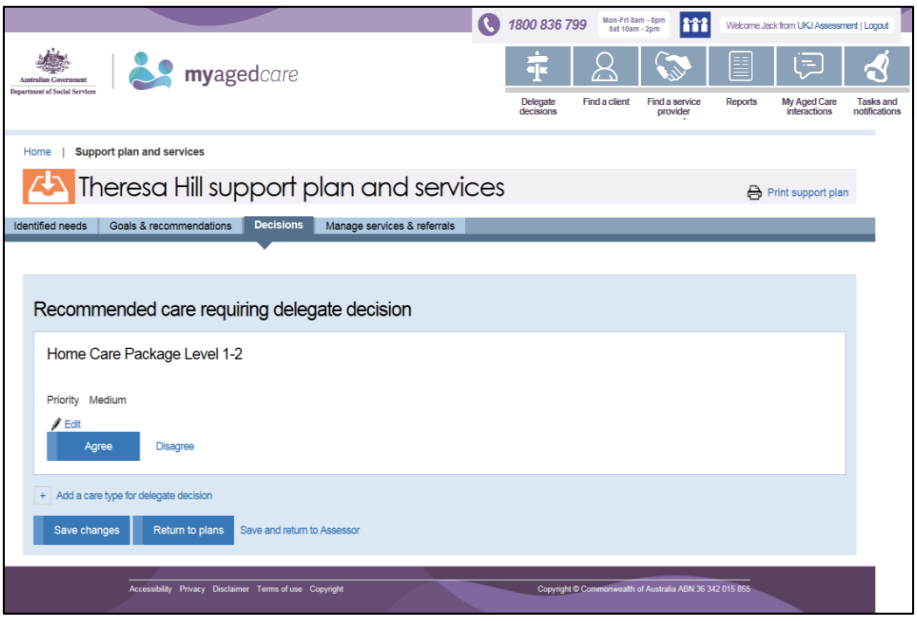
4.3 Making Delegate decision

To record the Delegate decision follow the steps below.

Step One: From the 'Decision pending' tab, select the arrow on the 'Client card' to display a summary of the client's information on the right hand side of the page. Select 'Start decision process.'



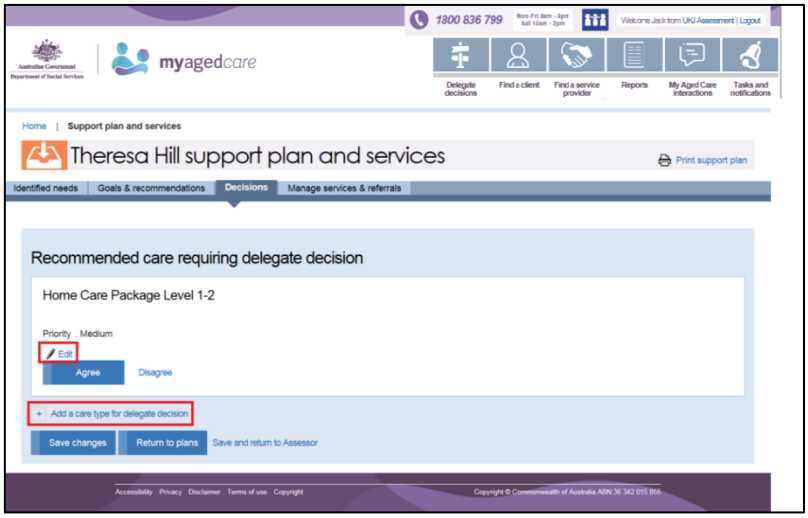
Step Two: You will be taken to the 'Decisions' tab on the support plan. The recommendations made by the Assessor will be displayed for your review.



You should view the client's record before recording a decision on the system.

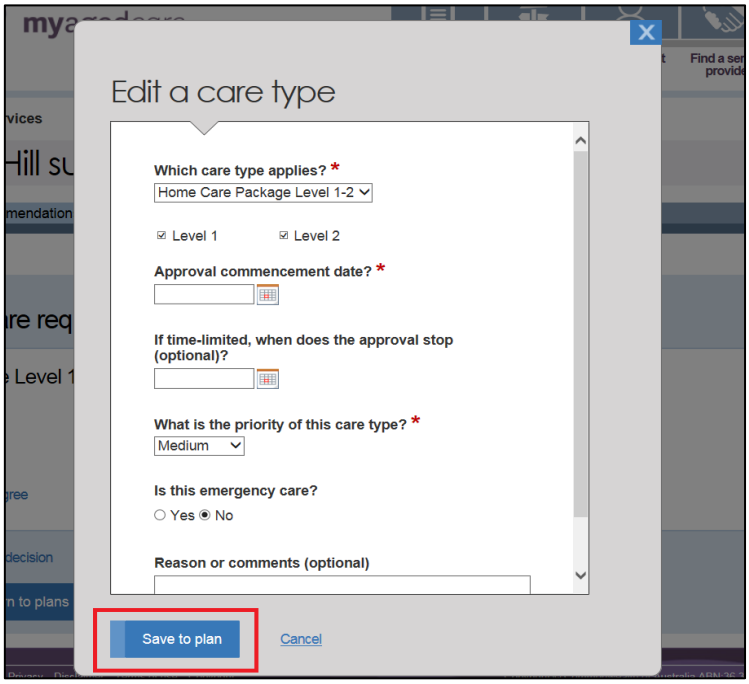
Step Three: There are a number of actions available to you on this page:

- Edit the details of an Assessor's recommendation (e.g. emergency care, time limitations)
- Agree or disagree with the Assessor's recommendations
- Add a difference care type/level.



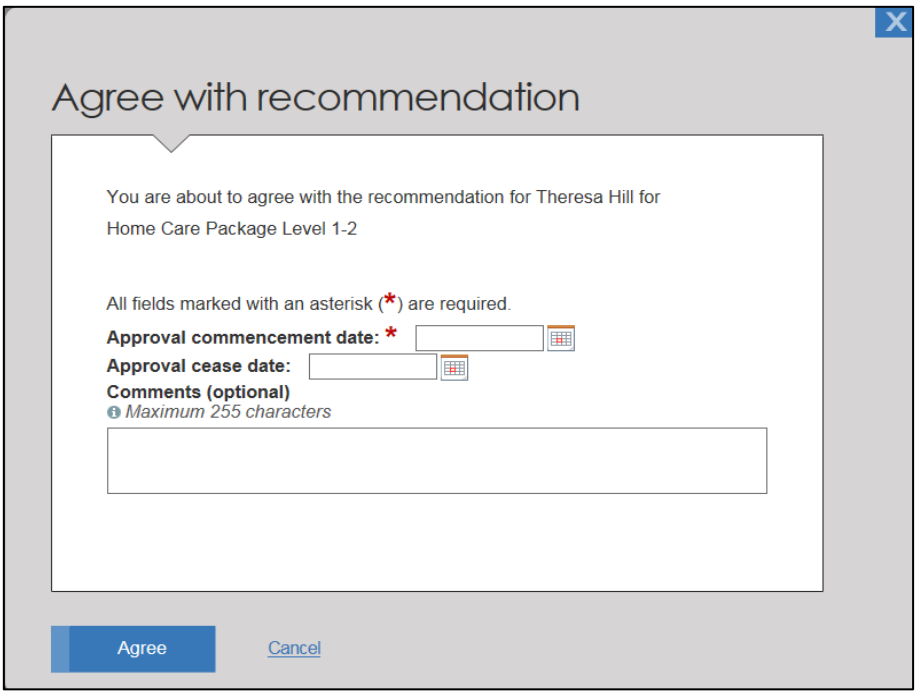
Editing a recommendation

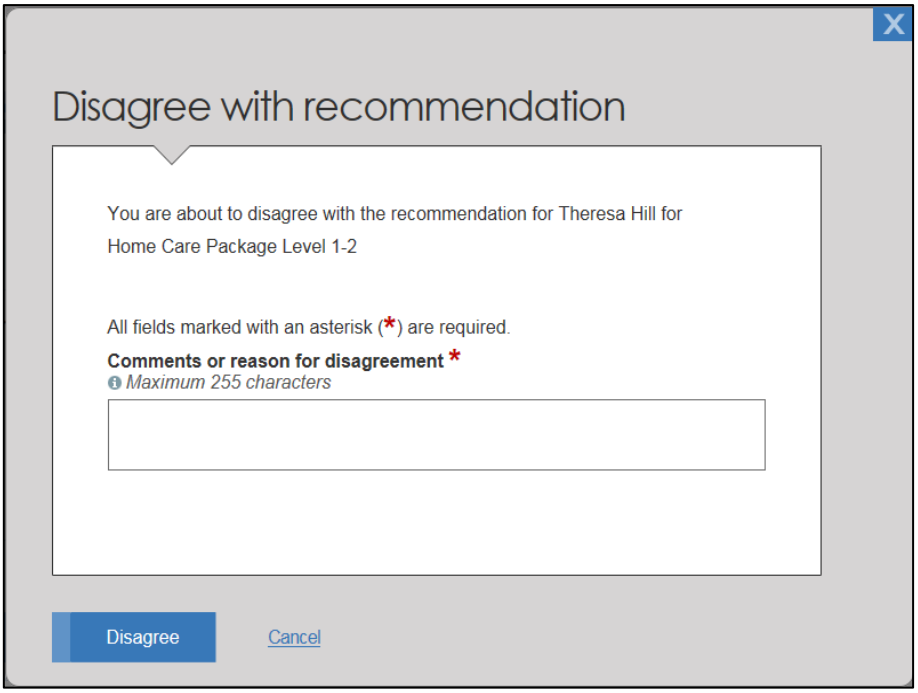
To edit a care type or level of care recommended by a Assessor, select 'Edit'. The care type information will be displayed and you will be able to make any changes required. Select 'Save to Plan' to save the changes.



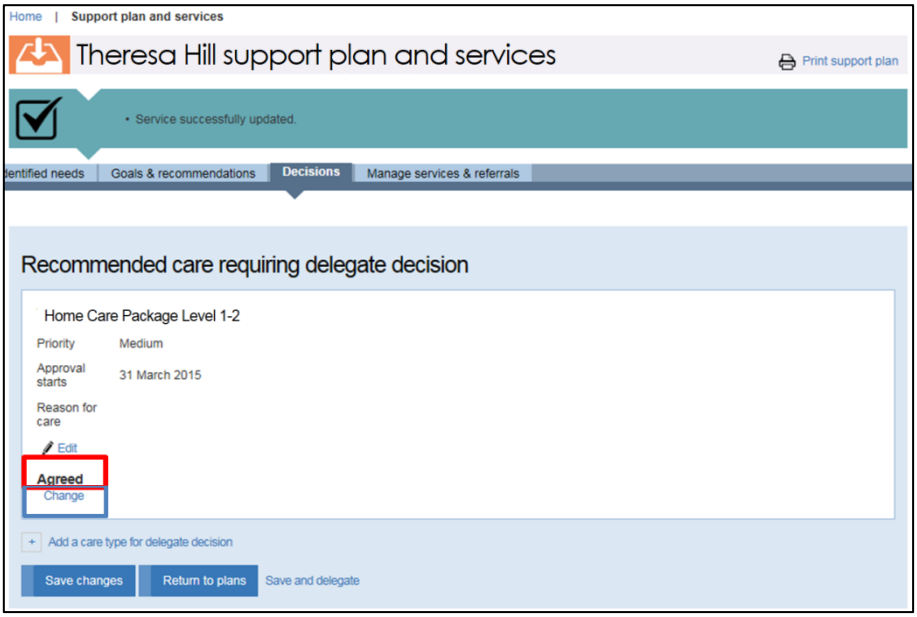
Agree or Disagree with Assessor's Recommendation

Step One: To agree or disagree with the Assessor's recommendation, select the relevant option below the recommended care type. You will need to record some details about your decision and reasons.


Agree with recommendation
You are about to agree with the recommendation for Theresa Hill for
Home Care Package Level 1-2
All fields marked with an asterisk (*) are required.
Approval commencement date: *
Approval cease date:
Comments (optional)
Maximum 255 characters
Agree
Cancel


Disagree with recommendation
You are about to disagree with the recommendation for Theresa Hill for
Home Care Package Level 1-2
All fields marked with an asterisk (*) are required.
Comments or reason for disagreement *
Maximum 255 characters
Disagree
Cancel

Step Two: You will be returned to the Decisions tab where the status of the recommendation will be recorded as either ‘Agreed’ or Disagreed’.

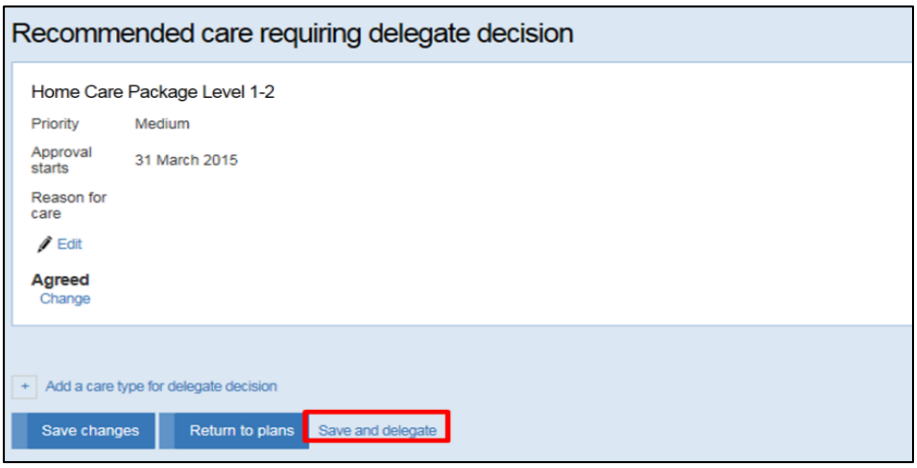


If you have incorrectly marked a recommendation as ‘Agreed’ or ‘Disagreed’, you can change this by selecting ‘Change’. Note that this will only work prior to saving and completing the approval process.

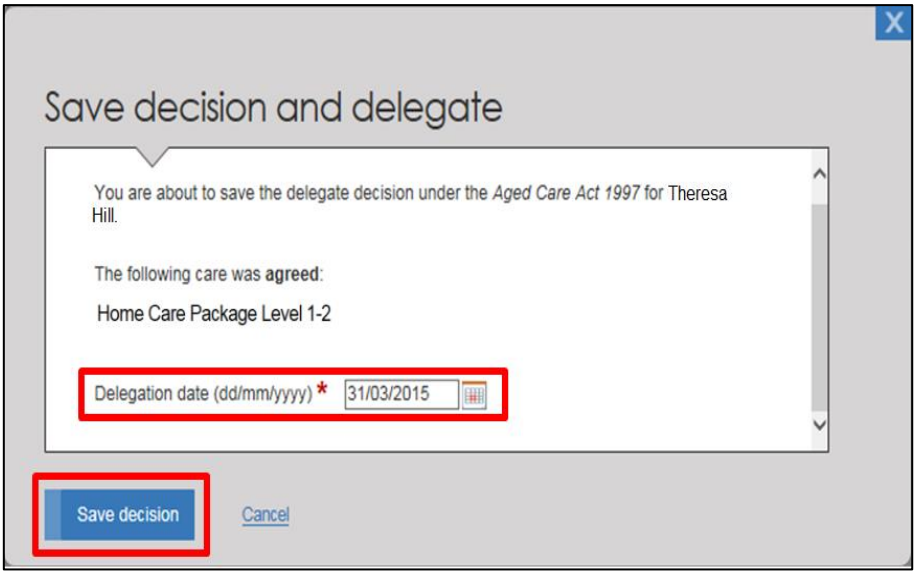
4.4 Recording decisions and sending Delegate decision letters

To record the Delegate decision follow the steps below.

Step One: When you have ensured the care types you are approving are listed, select 'Save and delegate'.

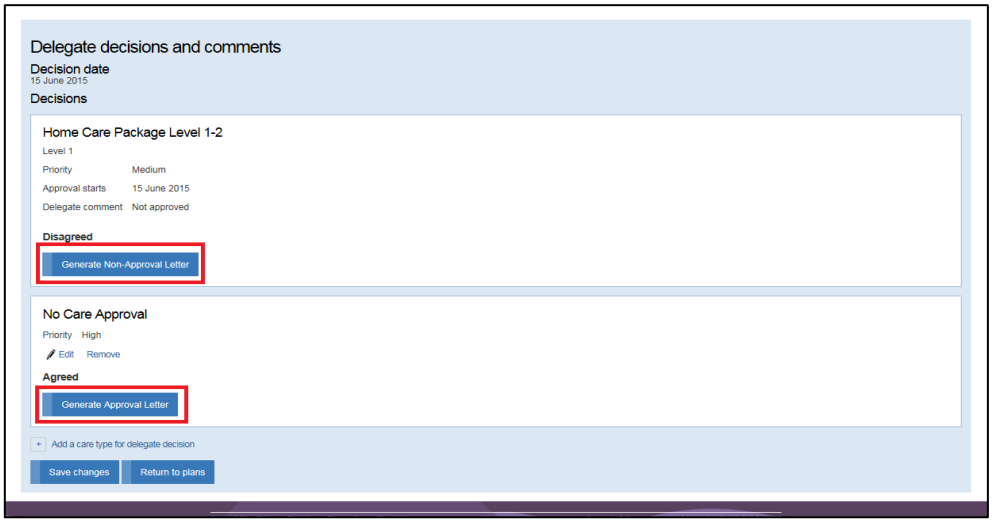


Step Two: Record the date of delegation and confirm you are ready to complete delegation by selecting 'Save decision'.


Save decision and delegate
You are about to save the delegate decision under the Aged Care Act 1997 for Theresa Hill.
The following care was agreed:
Home Care Package Level 1-2
Delegation date (dd/mm/yyyy) *
31/03/2015
Save decision
Cancel

Make sure that you check that the Delegation Date is correct. The system will default to the day's date. If you have completed the approval process using a hardcopy form on a previous date, you will need to record the date you actually made the decision. You must also scan and upload this document as evidence to be stored on the client record.

Step Three: From the ‘Decisions’ tab, you can select ‘Generate Approval Letter’ or ‘Generate Non-Approval Letter’. You will have the option to open and save the document.

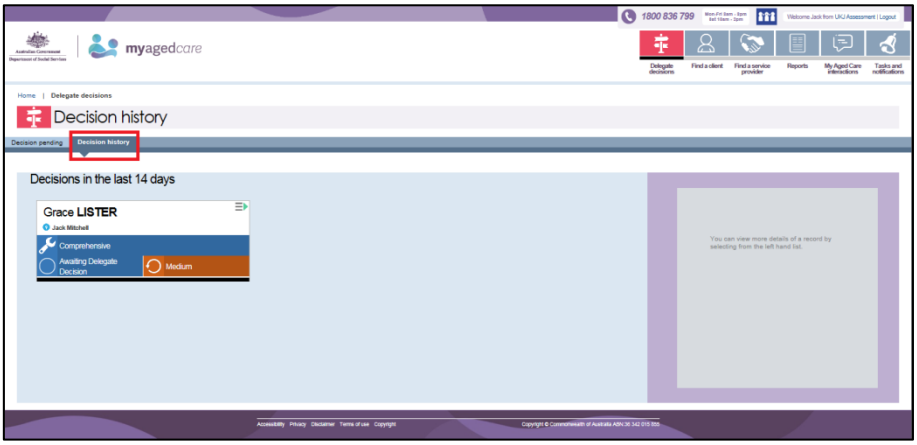


4.5 Requesting correction to care approval decision

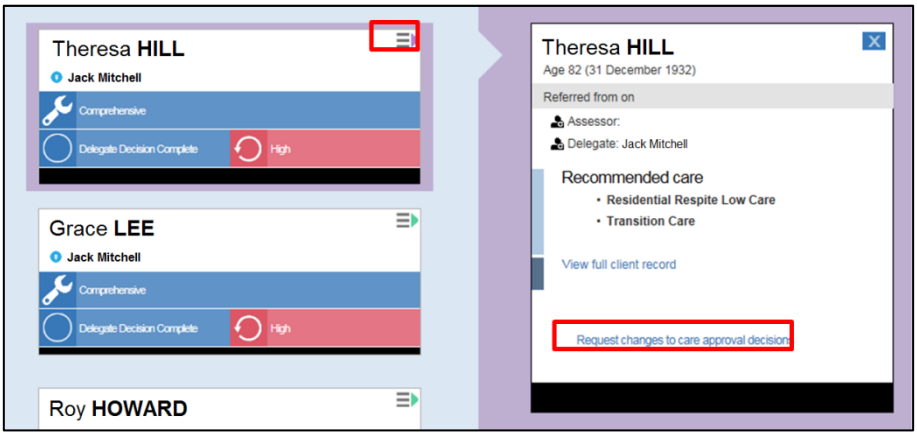
A corrections process is available where you have made an error in recording a decision.

To request a correction to care approval decisions follow the steps below.

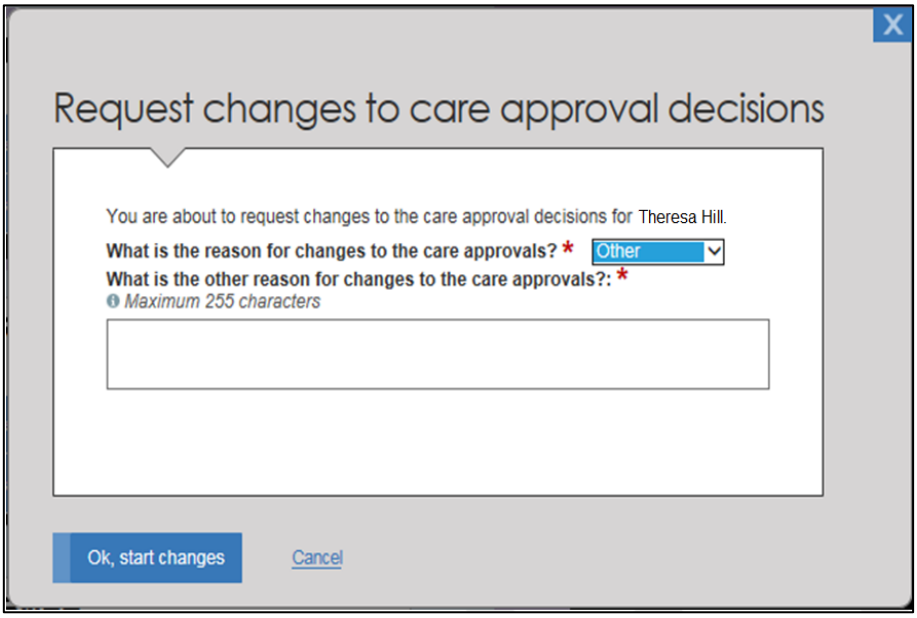
Step One: Navigate to your ‘Decision history’ tab



Step Two: Select the arrow on the ‘Client card’ to display a summary of the client’s information on the right hand side of the page. Select ‘Request changes to care approval decision’

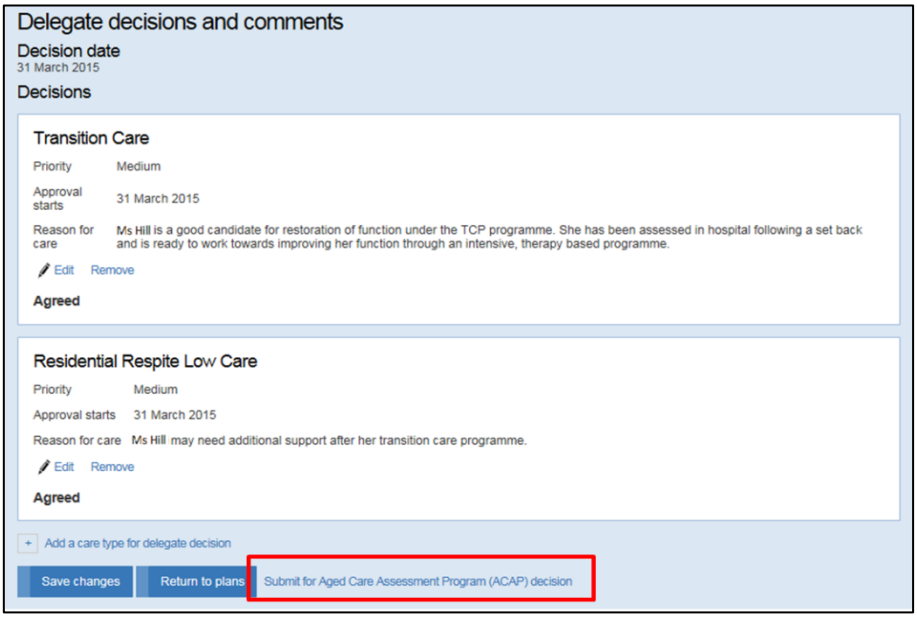


Step Three: Record a reason for the change and select 'Ok, start changes'.

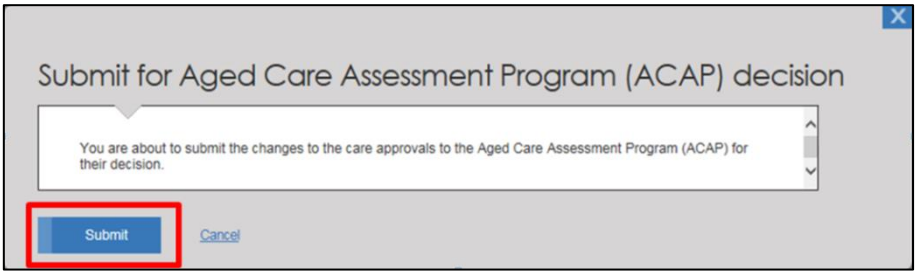

Request changes to care approval decisions
You are about to request changes to the care approval decisions for Theresa Hill.
What is the reason for changes to the care approvals? *
Other
What is the other reason for changes to the care approvals?: *
Maximum 255 characters
Ok, start changes
Cancel

Step Four: You will receive a confirmation message of your change request, and you can make changes to the care approvals as required.

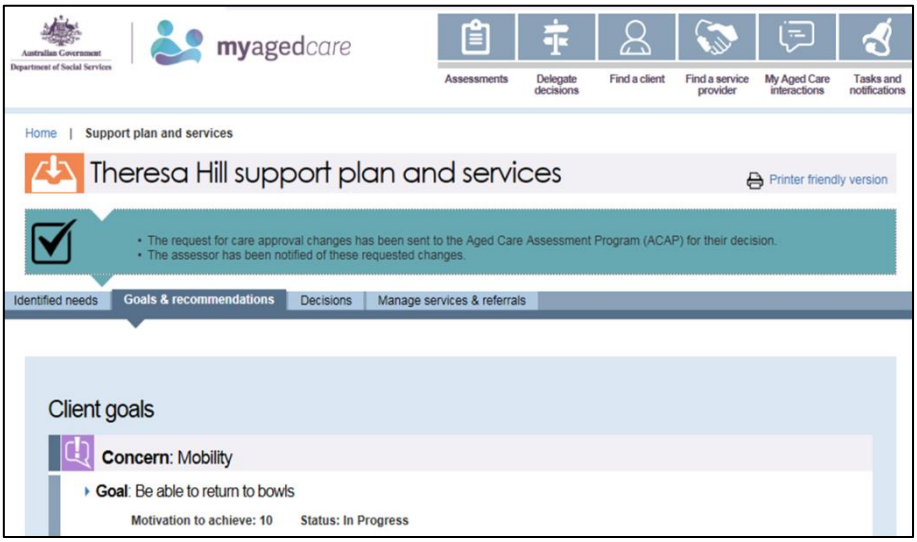
Step Five: When you have made the required changes to the care approval decisions, select 'Submit for Aged Care Assessment Programme (ACAP) decision'.


Delegate decisions and comments
Decision date
31 March 2015
Decisions
Transition Care
Priority Medium
Approval starts 31 March 2015
Reason for care Ms Hill is a good candidate for restoration of function under the TCP programme. She has been assessed in hospital following a set back and is ready to work towards improving her function through an intensive, therapy based programme.
Edit Remove
Agreed
Residential Respite Low Care
Priority Medium
Approval starts 31 March 2015
Reason for care Ms Hill may need additional support after her transition care programme.
Edit Remove
Agreed
Add a care type for delegate decision
Save changes
Return to plans
Submit for Aged Care Assessment Program (ACAP) decision

Step Six: You will receive a pop up message requesting confirmation to proceed. Select 'Submit'.


Submit for Aged Care Assessment Program (ACAP) decision
You are about to submit the changes to the care approvals to the Aged Care Assessment Program (ACAP) for their decision.
Submit
Cancel

Step Seven: You will receive a confirmation message that the correction request has been submitted to ACAP.


myagedcare
Assessments
Delegate decisions
Find a client
Find a service provider
My Aged Care interactions
Tasks and notifications
Home | Support plan and services
Theresa Hill support plan and services
Printer friendly version
• The request for care approval changes has been sent to the Aged Care Assessment Program (ACAP) for their decision.
• The assessor has been notified of these requested changes.
Identified needs
Goals & recommendations
Decisions
Manage services & referrals
Client goals
Concern: Mobility
Goal: Be able to return to bowls
Motivation to achieve: 10
Status: In Progress

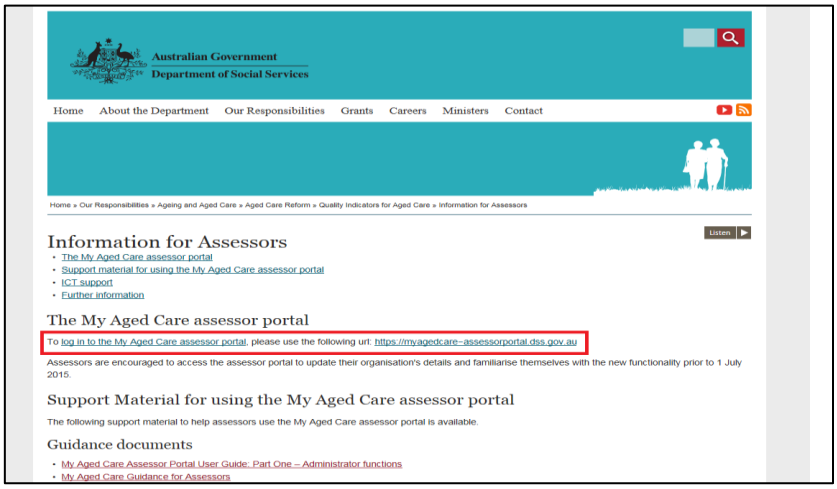
Correction requests are able to be submitted up to 14 days after initial delegation.

Attachment A - First time login to the assessor portal

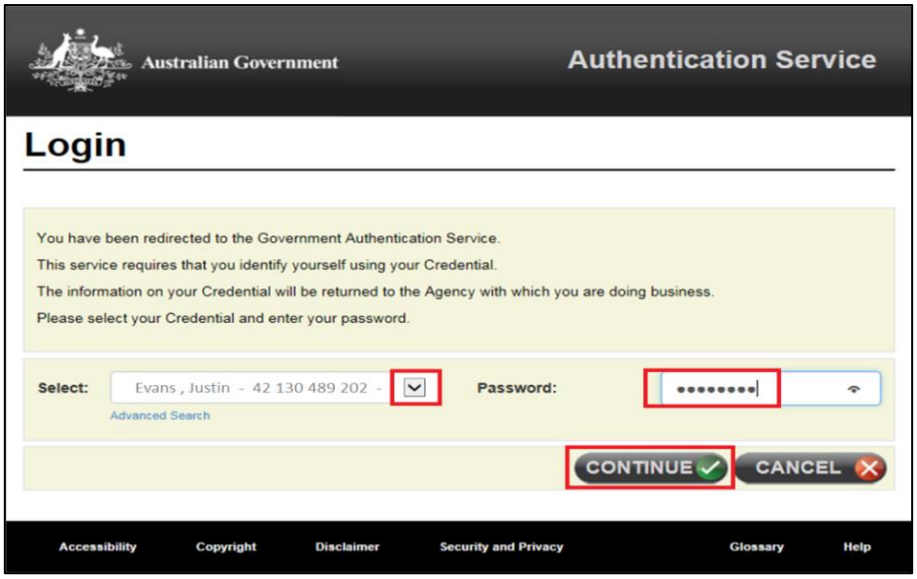
Before you login to the assessor portal for the first time, you need to activate your account by completing the following steps.

> You must have an individual AUSkey linked to your organisation to access the assessor portal. For more information, visit https://abr.gov.au/AUSkey/.

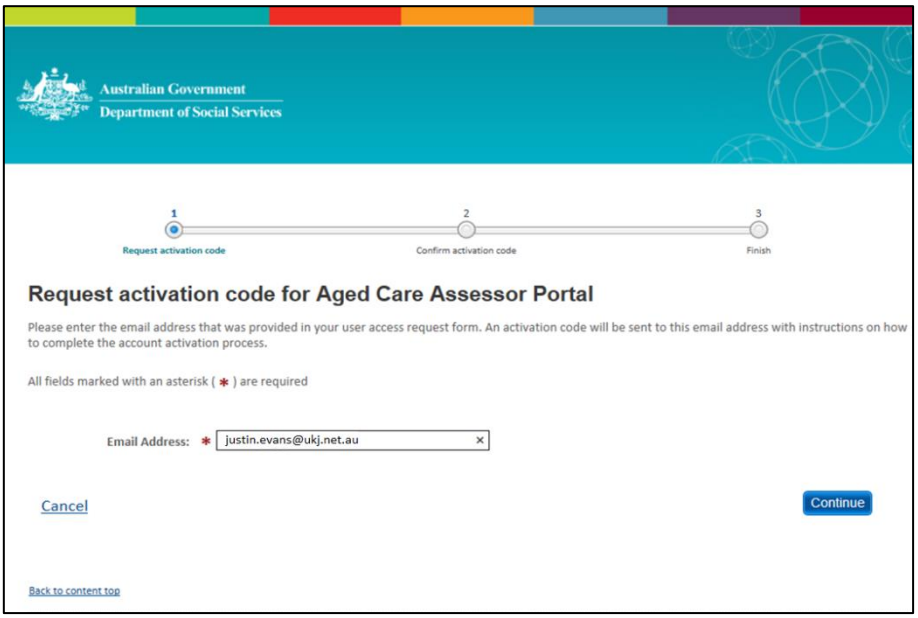
Step One: Go to the 'Information for Assessors' section of the DSS website at www.dss.gov.au/information-for-assessors and select the 'My Aged Care Assessor Portal' link. The assessor portal can also be accessed at: https://myagedcare-assessorportal.dss.gov.au.


Australian Government
Department of Social Services
Home
About the Department
Our Responsibilities
Grants
Careers
Ministers
Contact
Information for Assessors
The My Aged Care assessor portal
Support material for using the My Aged Care assessor portal
ICT support
Further information
The My Aged Care assessor portal
To log in to the My Aged Care assessor portal, please use the following url: https://myagedcare-assessorportal.dss.gov.au
Assessors are encouraged to access the assessor portal to update their organisation's details and familiarise themselves with the new functionality prior to 1 July 2015.
Support Material for using the My Aged Care assessor portal
The following support material to help assessors use the My Aged Care assessor portal is available.
Guidance documents
My Aged Care Assessor Portal User Guide: Part One – Administrator functions
My Aged Care Guidance for Assessors

Step Two: An Australian Government 'Authentication Service' page will be displayed. Select your AUSkey credentials from the drop down list. Enter your AUSkey password and select 'Continue'.



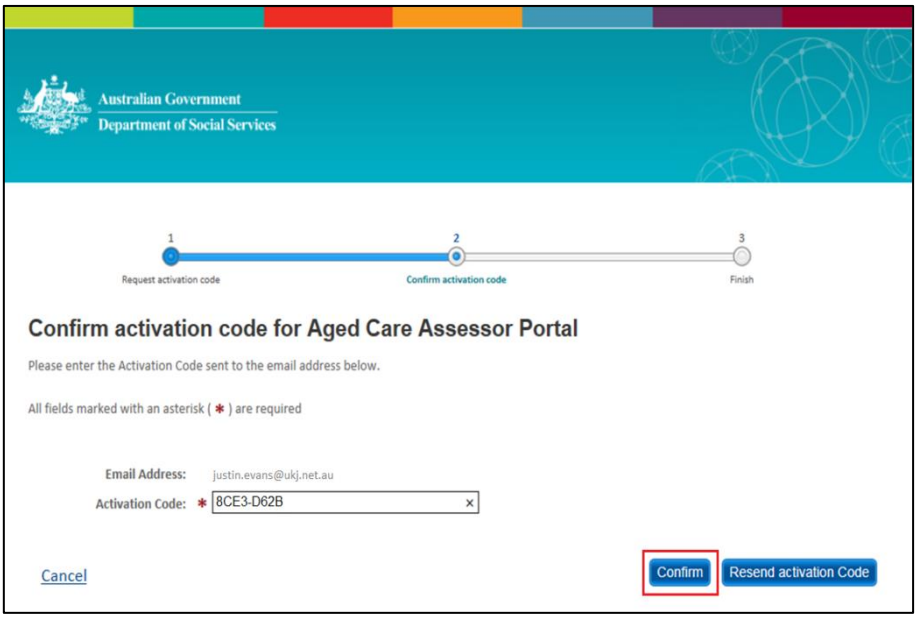
Step Three: A DSS 'Request activation code' page will be displayed. Enter the email address that is linked to your portal user account, and select 'Continue'.


Australian Government
Department of Social Services
1
Request activation code
2
Confirm activation code
3
Finish
Request activation code for Aged Care Assessor Portal
Please enter the email address that was provided in your user access request form. An activation code will be sent to this email address with instructions on how to complete the account activation process.
All fields marked with an asterisk (*) are required
Email Address: * justin.evans@ukj.net.au
Cancel
Continue
Back to content top

Step Four: You will receive an email with an activation code. You will only need to use this activation code when logging in for the first time.

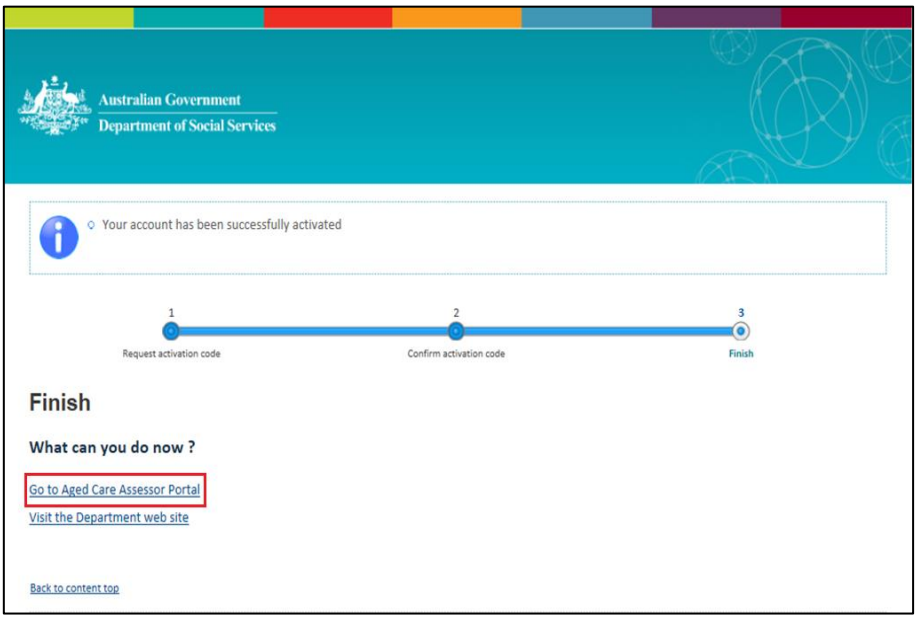
> If you do not receive an email with your activation code, contact your Organisation Administrator or the My Aged Care service provider and assessor helpline.

Step Five: Enter the activation code you were provided via email, and select 'Confirm'. Your account has now been successfully activated.

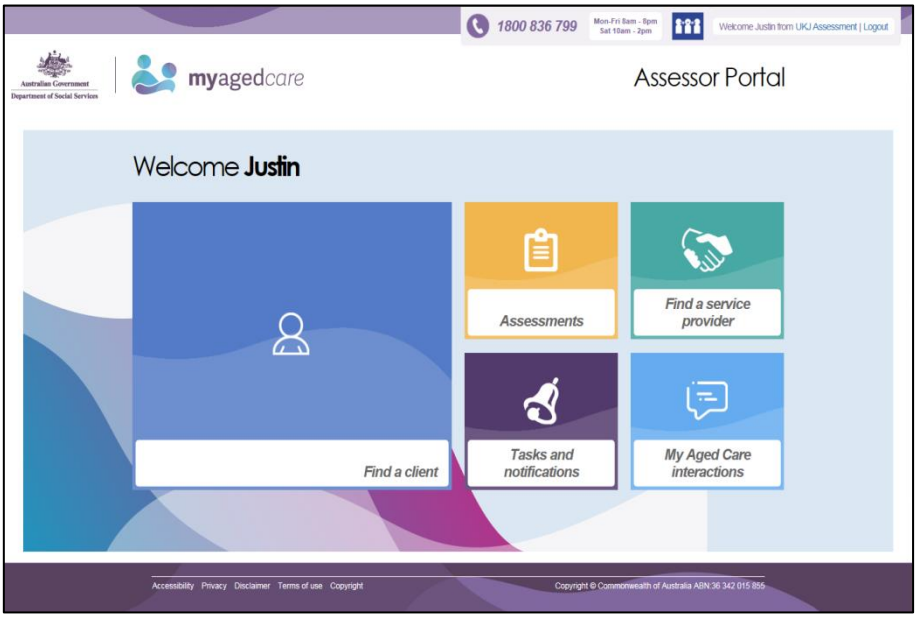


Your activation code is only valid for five days. If you require a new activation code, select 'Resend activation Code'.

Step Six: Select 'Go to My Aged Care assessor portal' to be directed to the assessor portal.



Step Seven: The assessor portal homepage will be displayed.



You have now set up access to the assessor portal. The next time you login, follow the steps in Section 1.6.

Attachment B - Generating reports and accessing forms

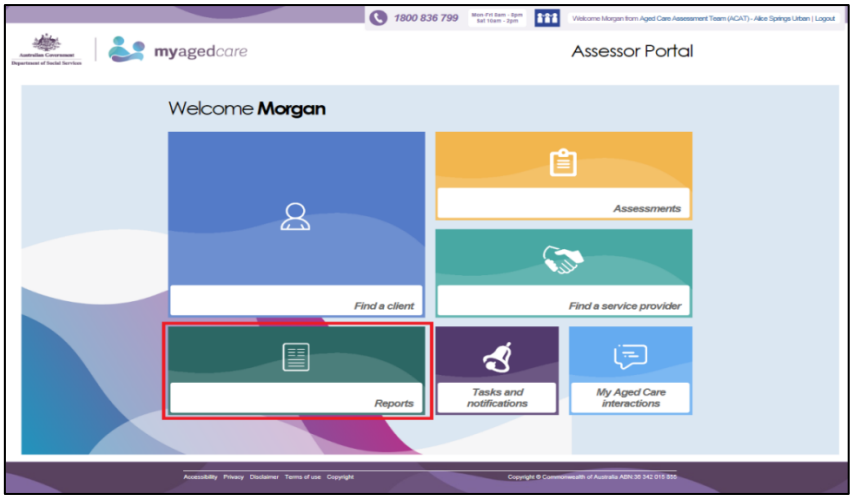
Assessment organisations can generate and view reports and access forms via the My Aged Care assessor portal.

You will also be able to use the 'Reports' feature to print documents, including completed NSAFs and letters. More information about the reports and forms available in the assessor portal is available in Guidance for Assessors.

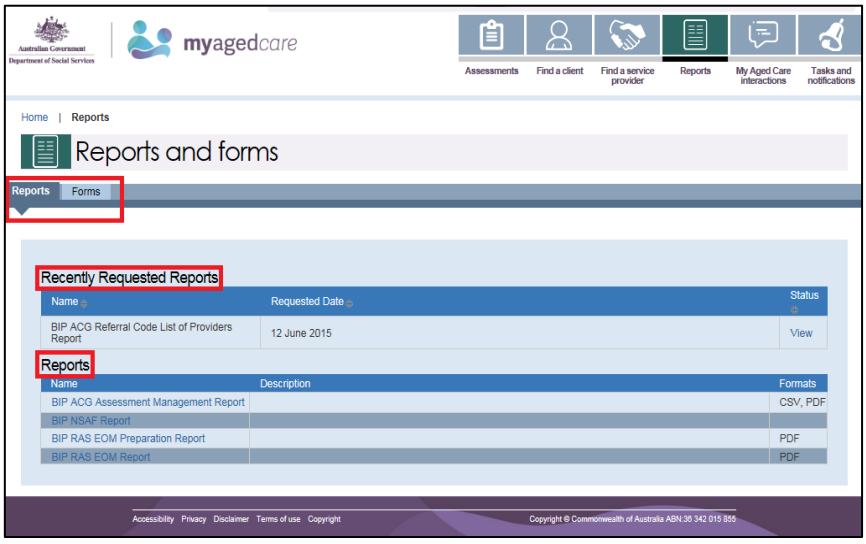
1 Generating reports

The steps to generate a report are outlined below.

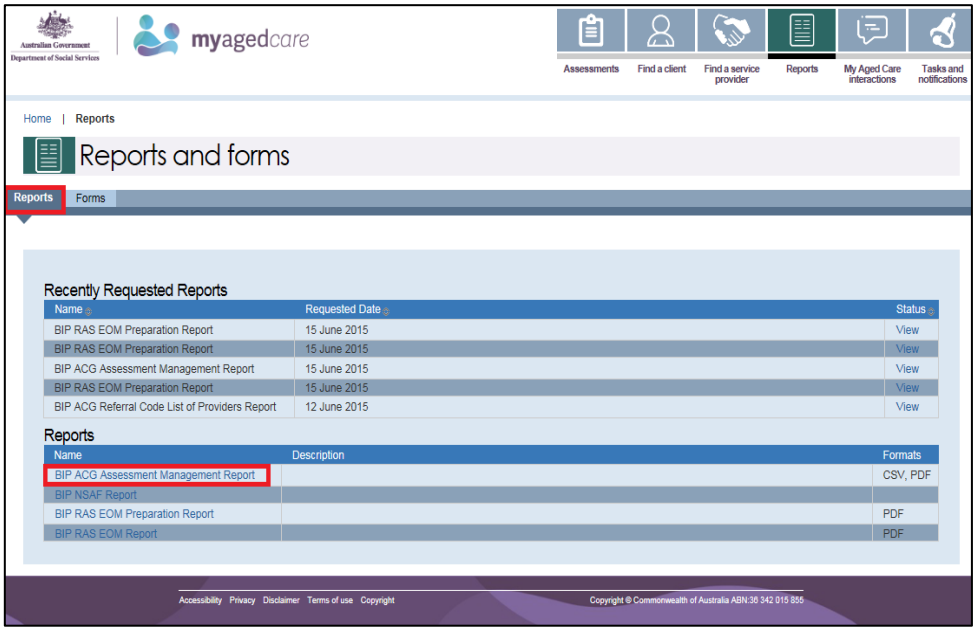
Step One: Select 'Reports' from the homepage. The 'Reports and forms' page will be displayed.



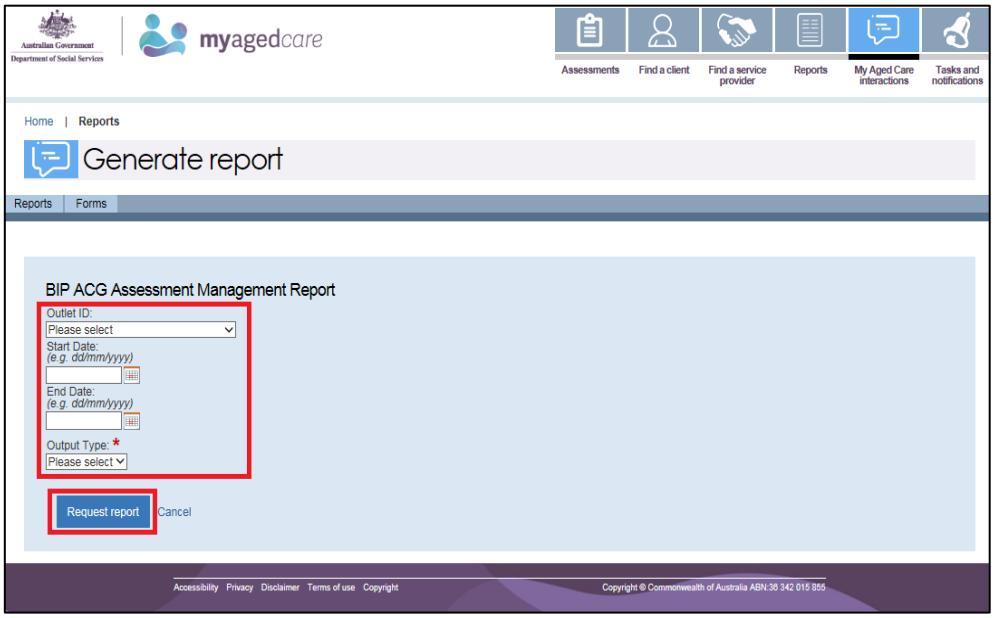
Step Two: The 'Reports and forms' page features a 'Reports' tab and a 'Forms' tab. The reports tab displays a list of 'Recently Requested Reports' and 'Reports'.



Step Three: To generate a report, select the name of the report in the 'Reports' list that you would like to generate.



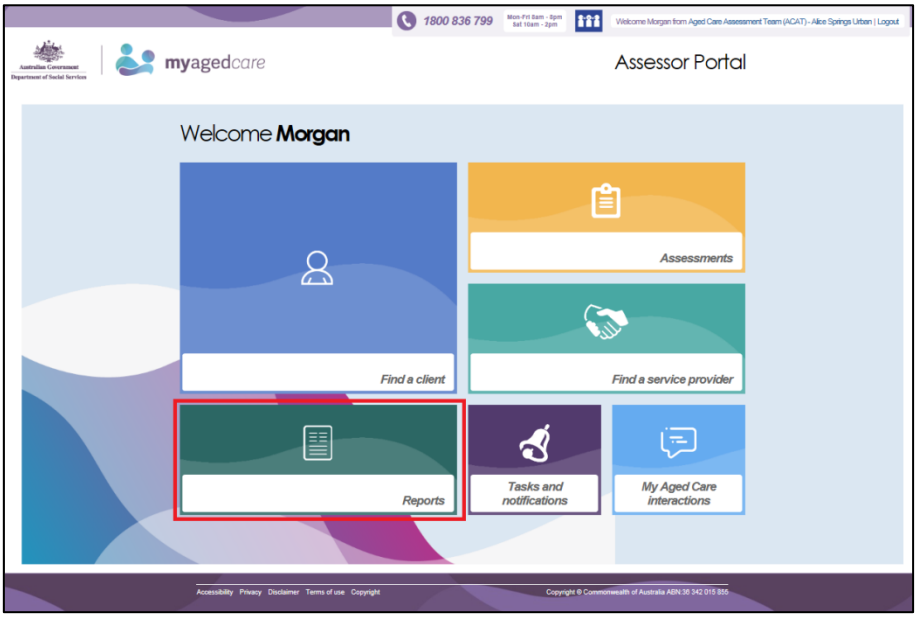
Step Four: Select the Outlet ID, enter a start date and end date, and an output type (CVS or PDF), then select 'Request report'. If you do not want to generate the report, select 'Cancel'.



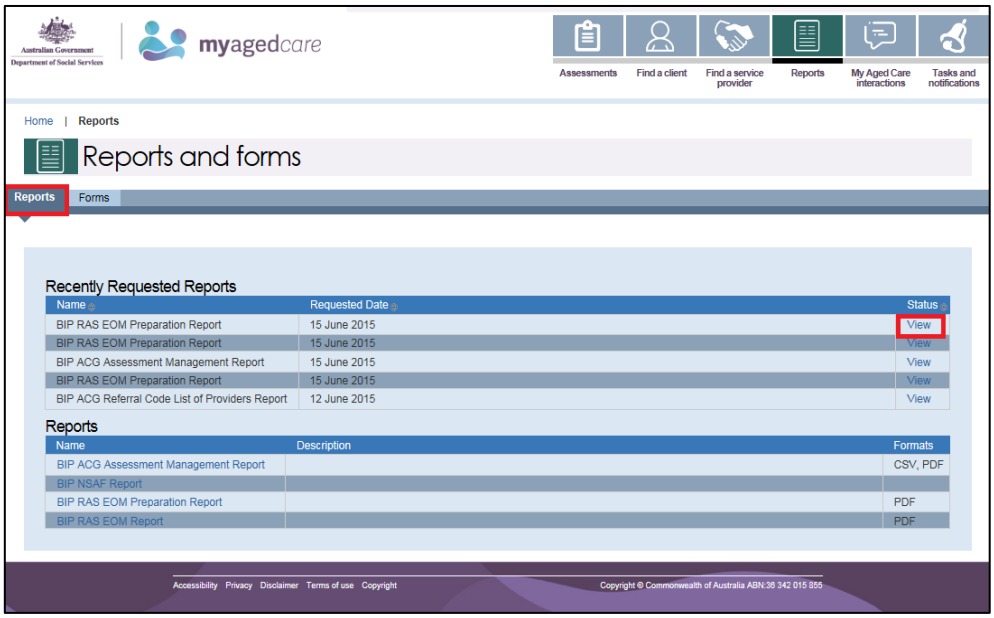
2 Viewing reports

To view reports follow the steps below.

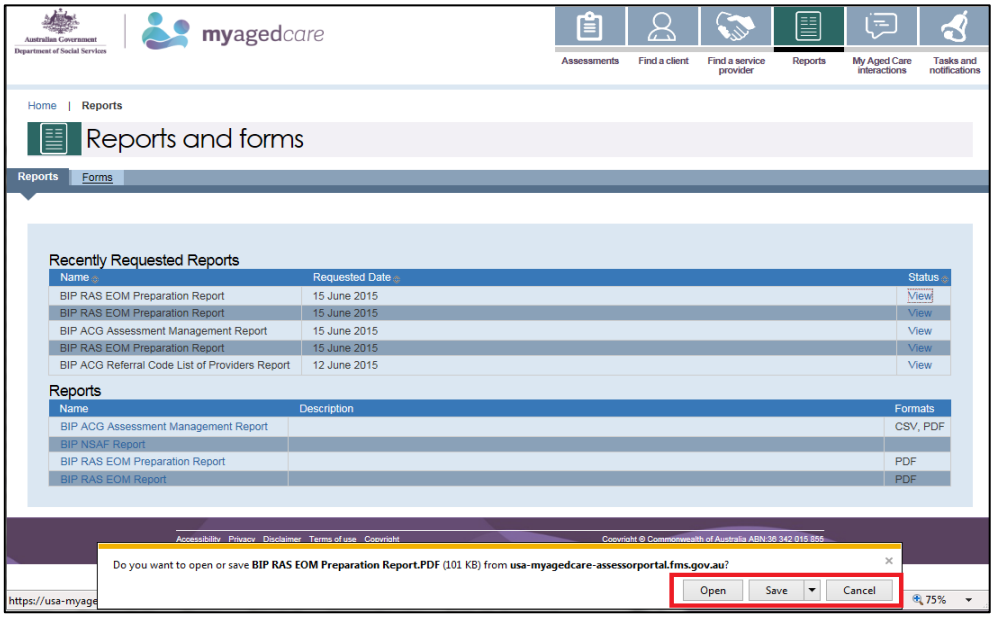
Step One: Select ‘Reports’ from the homepage. The ‘Reports and forms’ page will be displayed.



Step Two: In the ‘Recently Requested Reports’ list, select ‘View’ on the report you would like to view.



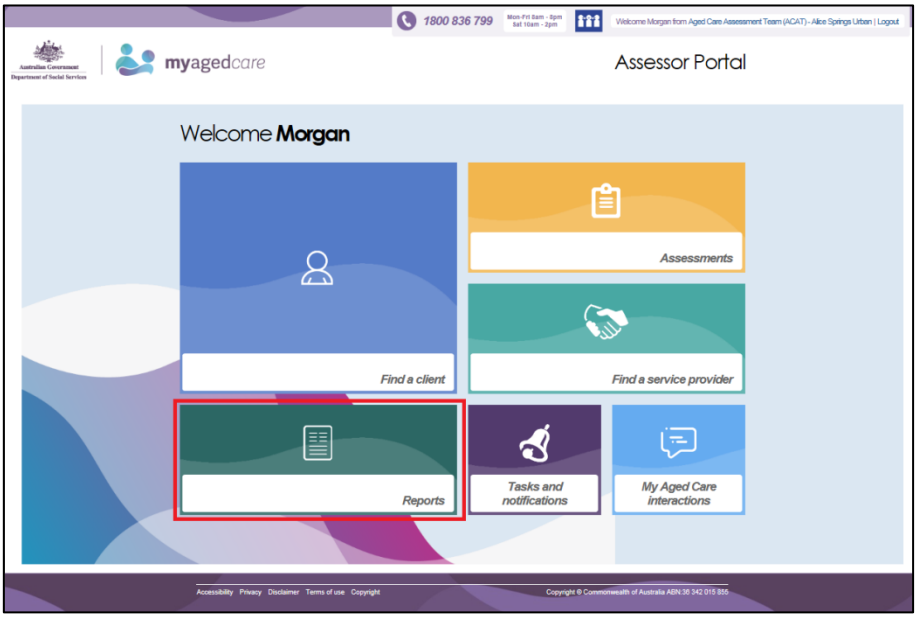
Step Three: Confirm that you want to ‘Open’, ‘Save’ or ‘Cancel’ the report.



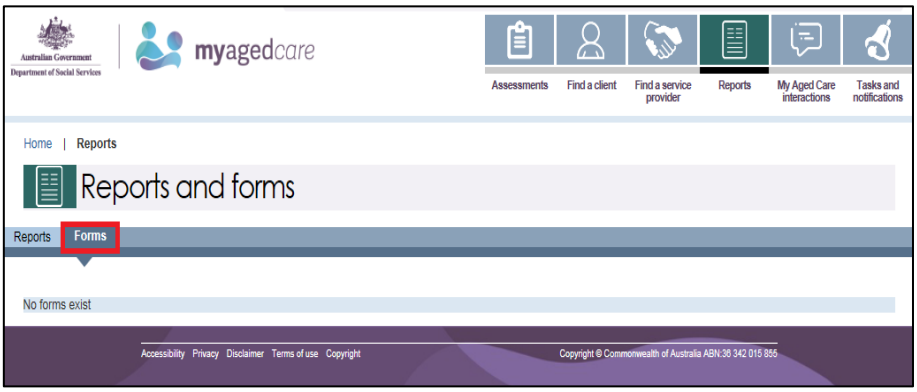
3 Accessing forms

To access forms follow the steps below.

Step One: Select ‘Reports’ from the homepage.



Step Two: Select the ‘Forms’ tab. A list of all forms available will be displayed.



Attachment C - Offline assessment using the myAssessor App

The myAssessor app enables assessors to undertake assessments offline and upload the information into the My Aged Care assessor portal at a later time. Assessors will prepare for assessments by downloading referrals for assessment (while connected to the internet) to their supported device before they undertake the assessment.

The app gives assessors access to a subset of functionality from the assessor portal, including the ability to perform an assessment using a version of the National Screening and Assessment Form (NSAF) and create a preliminary Support Plan. Once the assessor has internet connectivity, the assessor will upload the information, and use the decision support capability to verify the client's eligibility for services and the actions they recommended in the Support Plan.

The assessor will then need to complete the matching and referral process, and send any necessary referrals for service(s) or referral(s) to waitlist. The client's consent will need to be obtained prior to any referrals being sent.

The myAssessor app also enables assessors to conduct an assessment for a person who may not have previously registered with My Aged Care.

The processes that assessors will be able to undertake using the app include:

- Downloading referrals for assessment or adding a new client
- Viewing information about a client
- Completing identity verification (wallet check)
- Undertaking assessments
- Uploading assessment information to the My Aged Care assessor portal
- Removing assessments from the app.

You will not be able to download referrals for assessments when you are offline. You will be able to perform all other processes listed above when you are online and offline.

The myAssessor app is supported on:

- Samsung Galaxy Note 10.1" 2014 edition using Android version 4.4.2
- Apple iPad Air / iPad Air 2 9.7" using iOS version 8.2
- Windows Surface ™ Pro 3 12" using Windows version 8.1 Professional.

The myAssessor app can only be used by one assessor, and access cannot be shared. If the device needs to be assigned to another assessor, the app will need to be re-installed, and the new assessor will need to follow the first time activation process.

The myAssessor app will timeout if inactive for five minutes.

Please note: the screenshots below feature the myAssessor app on the Windows Surface ™ Pro 3 12” using Windows version 8.1 Professional. If you are using another device, the myAssessor app will render slightly differently.

1 Activating the app

Prior to using the myAssessor app, assessors will need to:

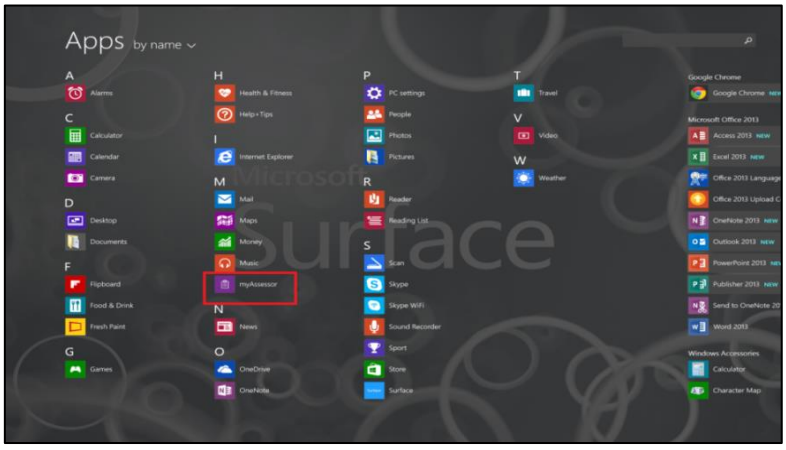
- Download the app
- Have a staff account in the My Aged Care assessor portal
- Call the My Aged Care service provider and assessor helpline (1800 836 799) to receive an activation code.

The activation code will be active for 24 hours from the time it is issued. If your code expires, call 1800 836 799 to have another code issued.

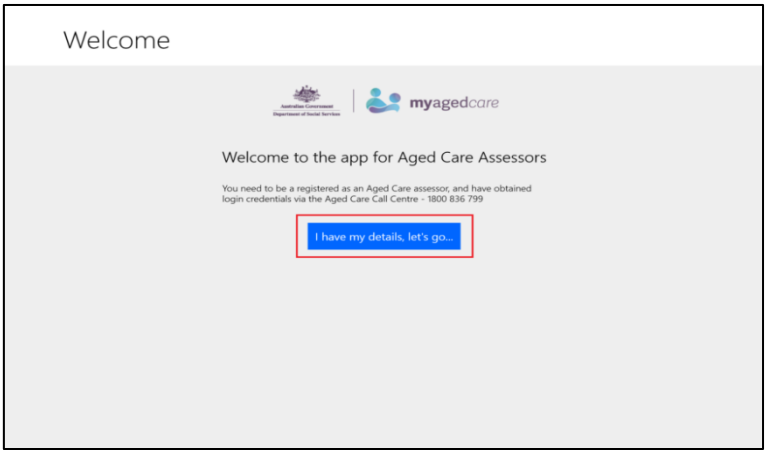
Note: you do **not** need an AUSkey installed on the device to use the myAssessor app.

To activate the app follow the steps below.

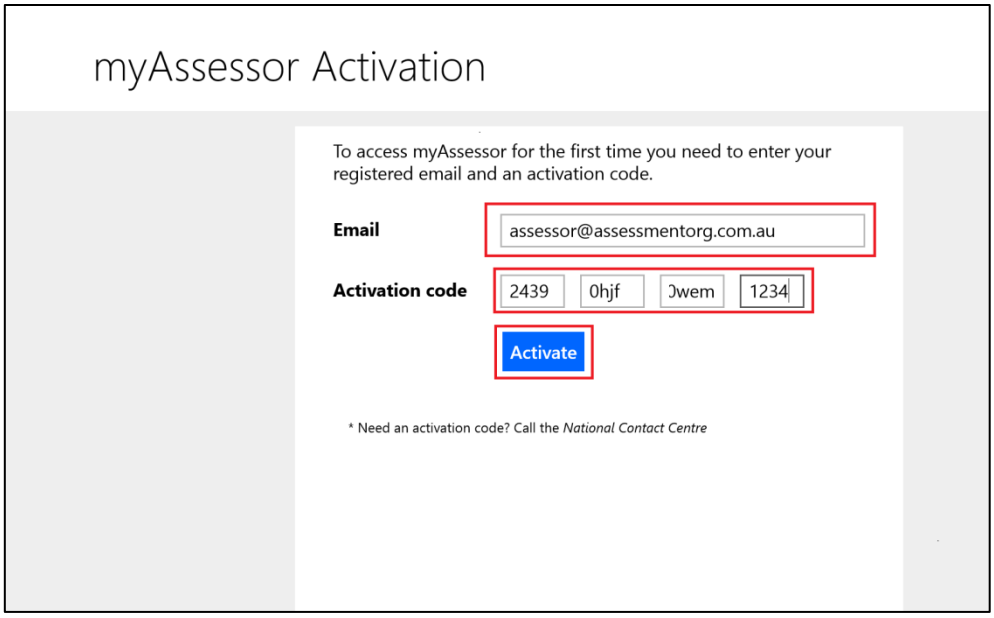
Step One: Open the app.



Step Two: A 'Welcome' page will display. You will be reminded you that you need a staff account in the My Aged Care assessor portal, and need to call 1800 836 799 to receive login credentials to activate the app. When you have this information, select 'I have my details, let's go…

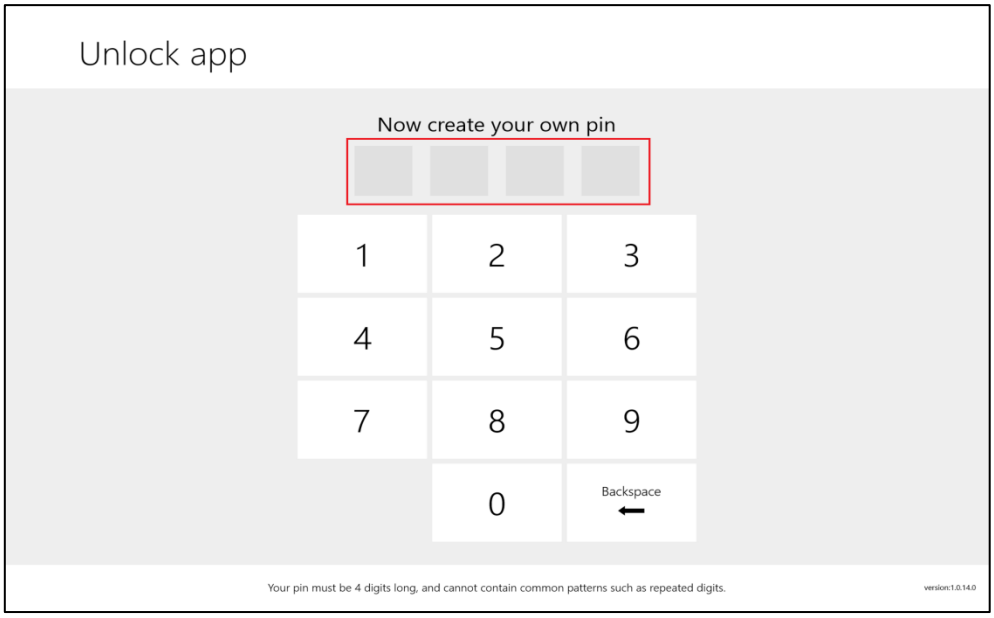

Welcome
myagedcare
Welcome to the app for Aged Care Assessors
You need to be a registered as an Aged Care assessor, and have obtained login credentials via the Aged Care Call Centre - 1800 836 799
I have my details, let's go...

Step Three: Enter your email address (must be the same email address associated with your staff account in the My Aged Care assessor portal), and the activation code, and select ‘Activate’. If successful, the ‘Unlock app’ screen will be displayed.

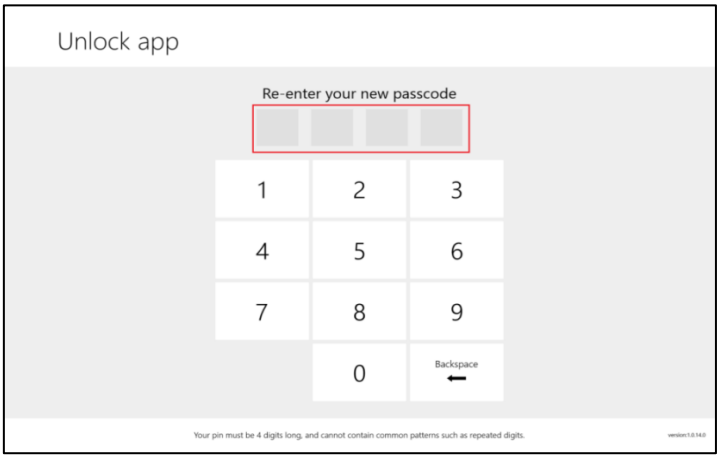


The information entered will be verified against information held in the My Aged Care assessor portal, if the information is incorrect, an error message will be displayed.

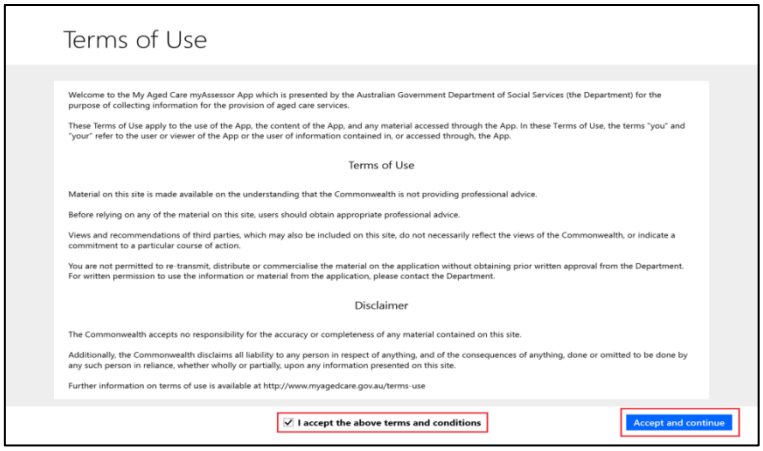
Step Four: Select a PIN. You will use this PIN to unlock the app each time you use it.



Step Five: Re-enter your PIN. The 'Terms of Use' screen will be displayed.



Step Six: Select 'I accept the above terms and conditions', and select 'Accept and continue'. The app homepage will be displayed.


Terms of Use
Welcome to the My Aged Care myAssessor App which is presented by the Australian Government Department of Social Services (the Department) for the purpose of collecting information for the provision of aged care services.
These Terms of Use apply to the use of the App, the content of the App, and any material accessed through the App. In these Terms of Use, the terms "you" and "your" refer to the user or viewer of the App or the user of information contained in, or accessed through, the App.
Terms of Use
Material on this site is made available on the understanding that the Commonwealth is not providing professional advice.
Before relying on any of the material on this site, users should obtain appropriate professional advice.
Views and recommendations of third parties, which may also be included on this site, do not necessarily reflect the views of the Commonwealth, or indicate a commitment to a particular course of action.
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Disclaimer
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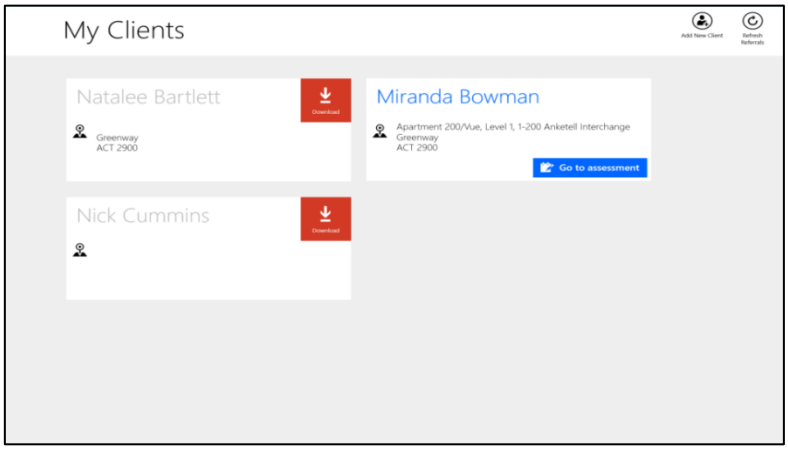
Additionally, the Commonwealth disclaims all liability to any person in respect of anything, and of the consequences of anything, done or omitted to be done by any such person in reliance, whether wholly or partially, upon any information presented on this site.
Further information on terms of use is available at http://www.myagedcare.gov.au/terms-use
I accept the above terms and conditions
Accept and continue

Step Seven: You have now successfully completed the activation process. The next time you sign in to the myAssessor app, follow the steps outlined in **Attachment C**: Section 2.

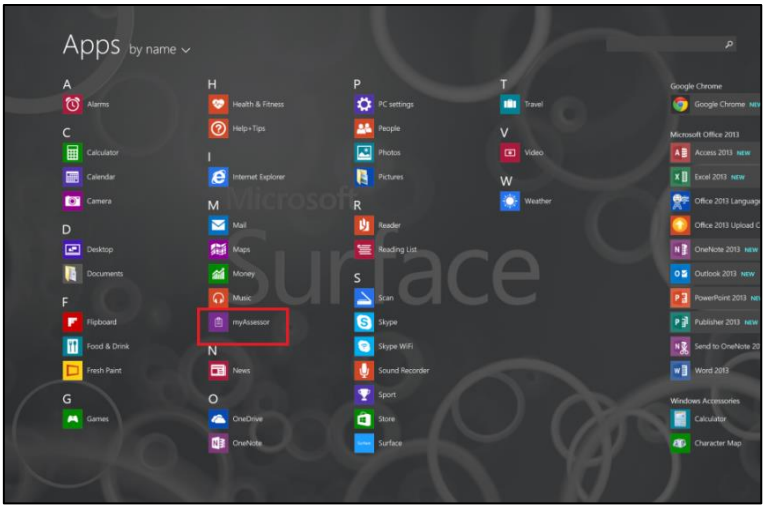


2 Signing in to the app after the first time

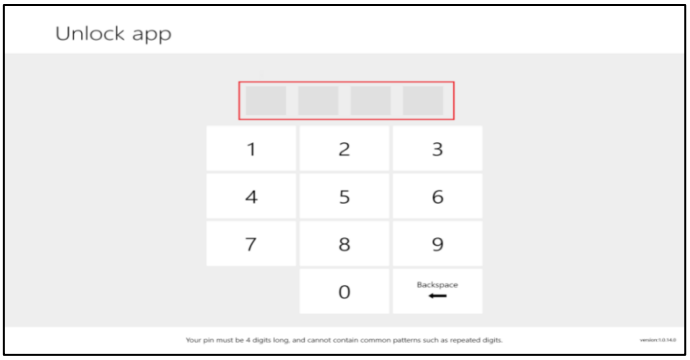
If you forget your PIN, enter your PIN incorrectly five times, or do not use the app for 14 days, you will be locked out of the app. You will need to call 1800 836 799. Contact centre staff will give you an eight digit code that you will need to enter to reset your PIN.

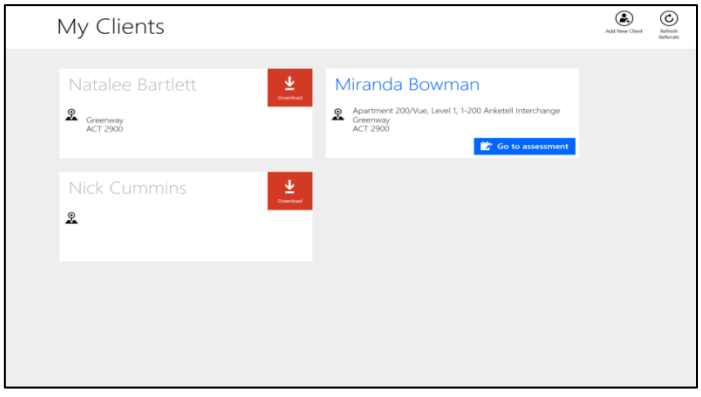
To sign in to the app after the first time activation process follow the steps below.

Step One: Open the app. The 'Unlock app' page will display.



Step Two: Enter your PIN. The 'My clients' page will be displayed.





3 Downloading referrals for assessment or adding a new client

You can download referrals for assessment for all clients that have been assigned to you in the My Aged Care assessor portal. When the referral for assessment is downloaded to the device, it will be pre-populated with information collected during screening and previous assessments (if applicable).

You will need an internet connection to download referrals for assessment to your device. The myAssessor app can store up to 50 clients at any one time.

When you download an assessment to your device, the client record will be locked in the My Aged Care assessor portal. This assessment will be locked until you 'Upload the assessment' (see **Attachment C**: Section 7).

A person with the Administrator role in the My Aged Care assessor portal can reassign downloaded referrals for assessment.

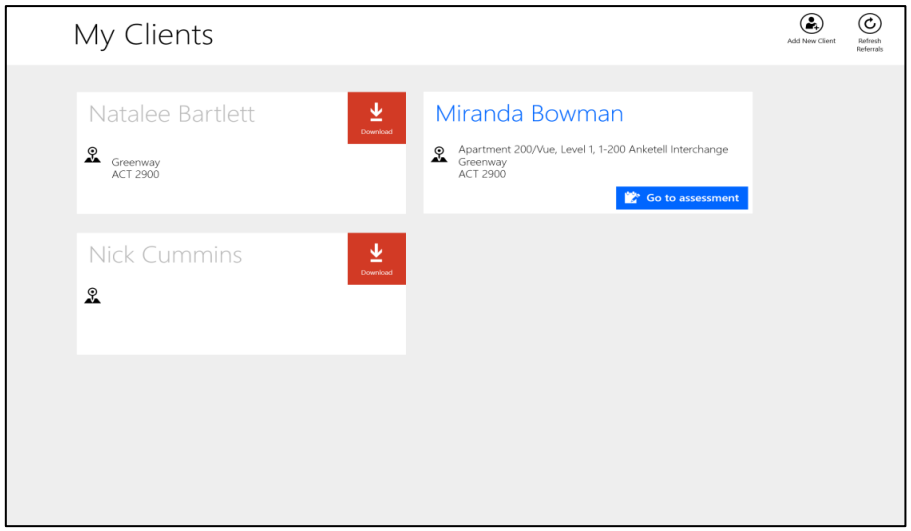
If a downloaded referral for assessment is reassigned, any data entered on the device will not be able to be uploaded and will be discarded by the app.

You will also be able to add a new client and conduct an assessment.

3.1 Downloading referrals for assessment

To download referrals for assessment when you are connected to the internet follow the steps below.

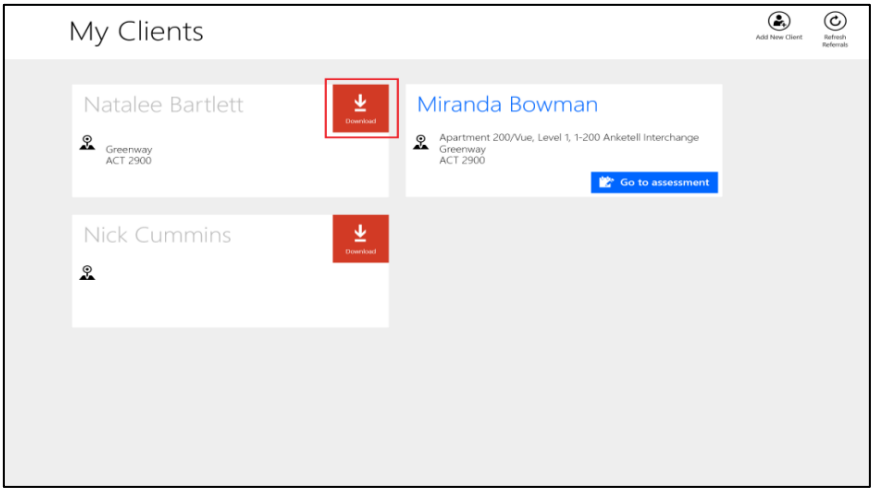
Step One: Open the app and enter your PIN, following the process in **Attachment C**: Section 2. The 'My clients' page will be displayed. Client cards will appear in alphabetical order.



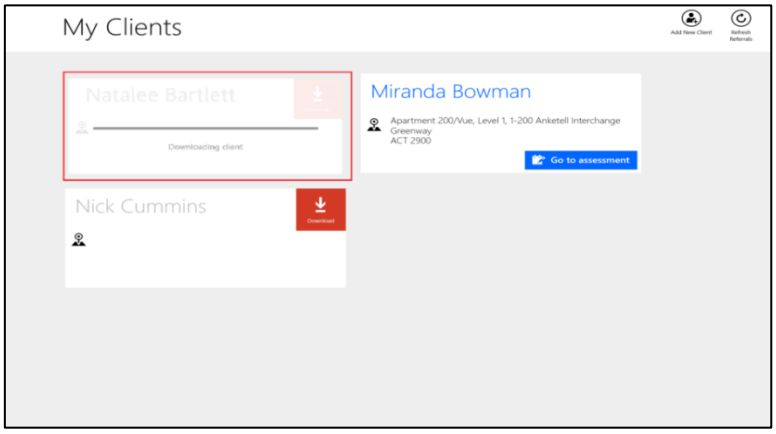
To ensure that you are viewing the most up to date list of the referrals you have been assigned, you can select 'Refresh Referrals' in the top right hand corner of the app when you are connected to the internet.

If you cannot see the client card on the 'My clients' page, speak to a person assigned the Team Leader role in the My Aged Care assessor portal to ensure the referral for assessment has been assigned to you.

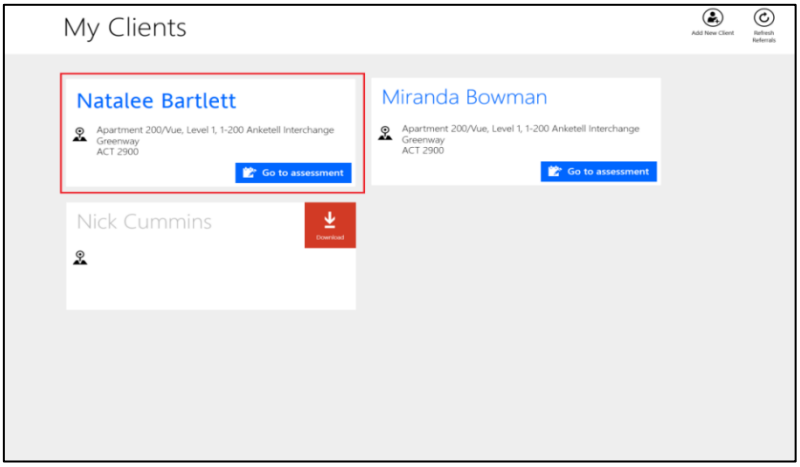
Step Two: Select 'Download' on the client card you want to download.



Step Three: The client card will fade and ‘Downloading client’ will appear.



Step Four: When the assessment has successfully downloaded, the text will change to blue, and you will have the option to ‘Go to assessment’. You will now be able to conduct the assessment (either online or offline).



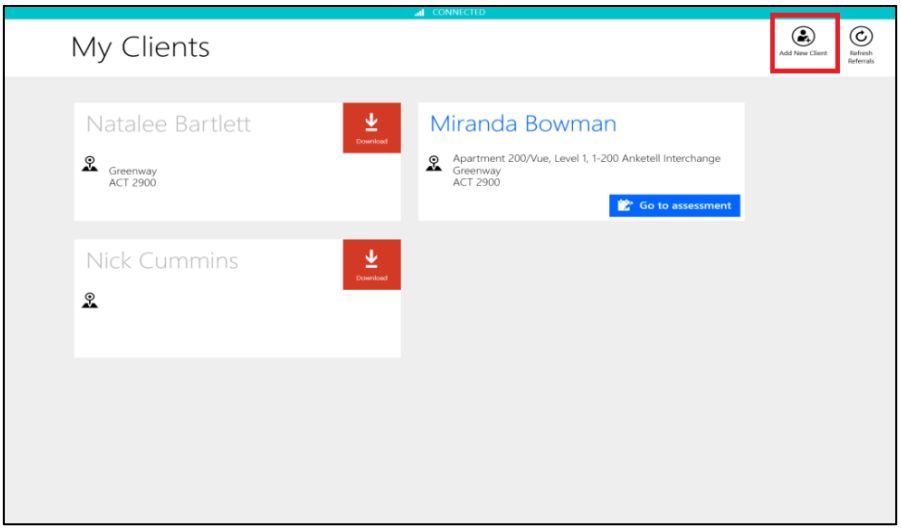
3.2 Adding a new client

You can complete an offline assessment for a person whose referral you have not downloaded. If the client has not been referred to you for assessment, you need to call 1800 836 799 to discuss the person's registration status with My Aged Care.

If you undertake an assessment for a new client without calling 1800 836 799 first (i.e. if you have no mobile coverage), you will need to contact the contact centre to register and refer the client to your organisation before you can upload the assessment to the My Aged Care assessor portal.

To add a new client follow the steps below.

Step One: Open the app and enter your PIN, following the process in **Attachment C**: Section 2. The 'My clients' page will be displayed. Select 'Add new client'.



Step Two: A page titled 'Unknown1' will be displayed. You will be able to add information about the client and undertake an assessment.

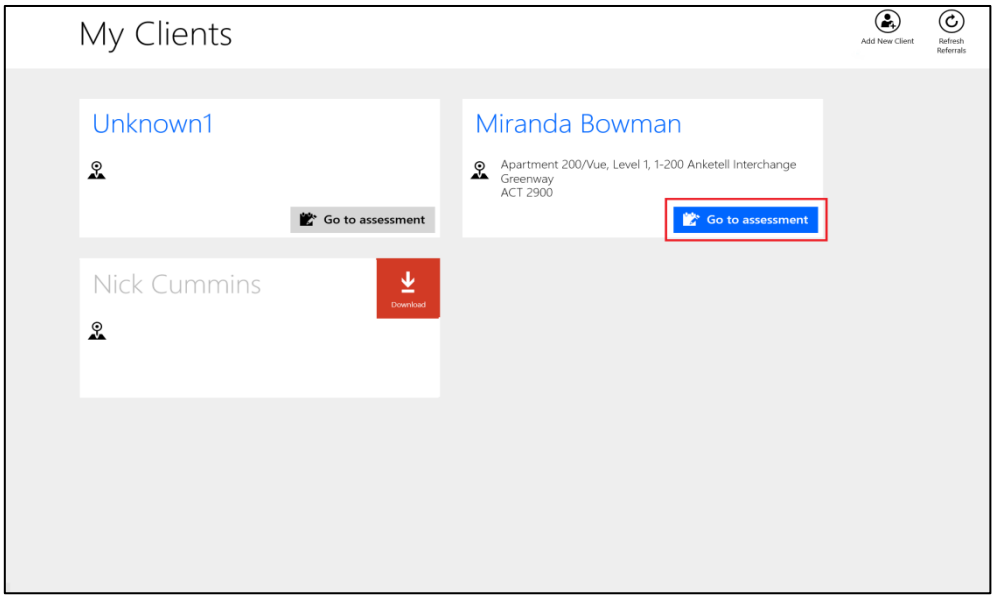
Unknown1
About the client
Capture the client's details such as: name, date of birth, country of birth, living arrangements, language, communication requirements, contact details, address, any payments being received, health insurance, and people that represent the client.
About
Wallet check
Attachments

4 Viewing information about clients

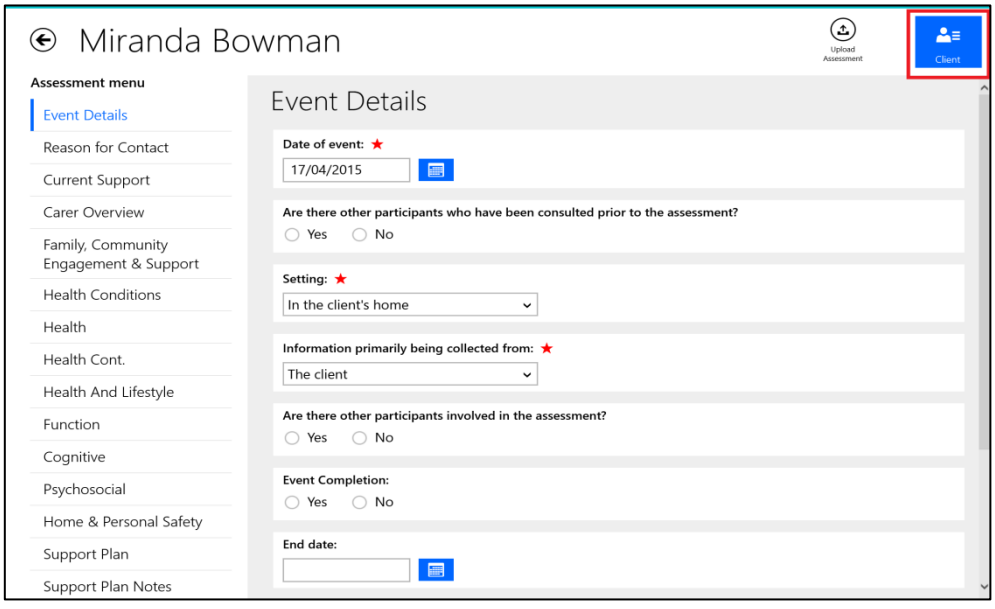
You will be able to view information about clients collected during screening (or any previous completed assessments) for your downloaded client cards.

To view information about clients follow the steps below.

Step One: Open the app and enter your PIN, following the process in **Attachment C**: Section 2. The 'My clients' page will be displayed. Select 'Go to assessment'. If you select the client's name, the 'client details' pages will be displayed.



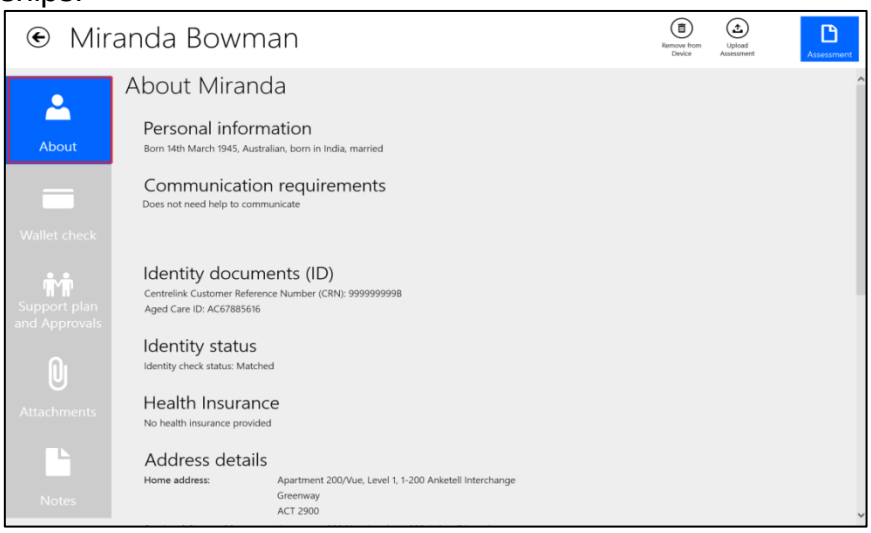
Step Two: Select 'Client' in the top right hand corner of the page. The 'Client' button will be visible when you are on the 'Assessment' pages. The 'Assessment' button will be visible when you are on the 'Client' pages.



About, Wallet Check, Support plan and Approvals, Attachments, and Notes

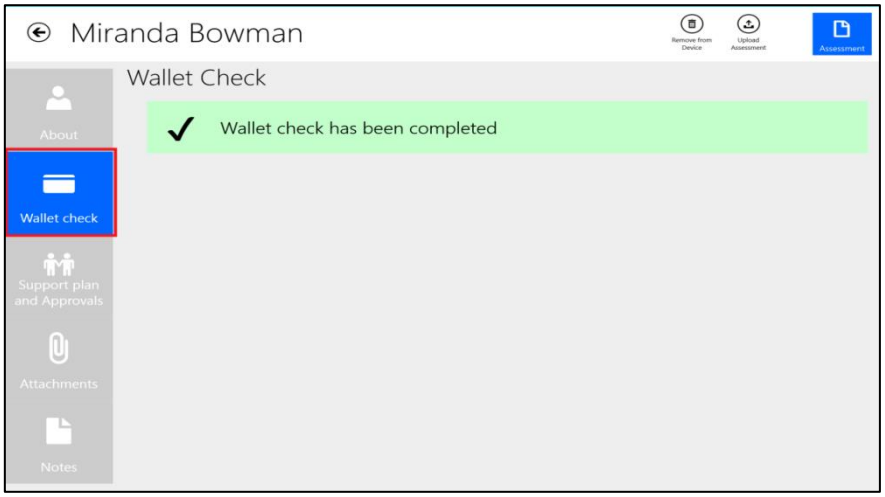
The '**About'** page displays information contained in the client record including:

- Personal information
- Communication requirements
- Identity documents
- Identity status
- Health Insurance
- Address details
- Contact details
- Relationships.

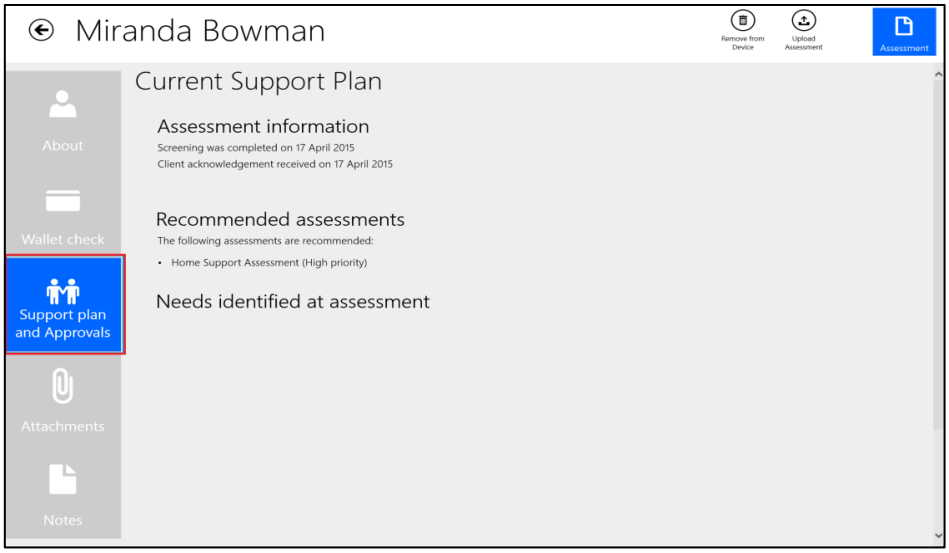


Client information is set to read only. If you need to make any changes to the information, you can use the 'Notes' function to remind yourself to make the necessary changes when you have uploaded the assessment to the My Aged Care assessor portal.

The '**Wallet check**' page displays the status of the wallet check.



The '**Support plan and Approvals'** page displays information collected during screening and previous assessments (if applicable). It will also contain information about Approvals, if applicable.

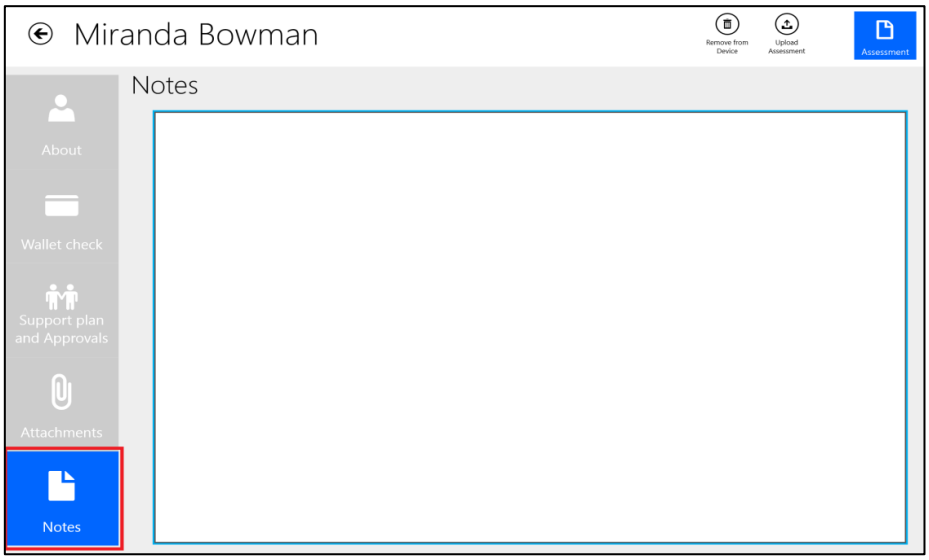


The '**Attachments'** page is a feature that allows you to add attachments by selecting 'Add an image'. The camera on the device will open.

The image will only save in the myAssessor app. The image will not be saved locally to the device.

You will need to enter a 'Name' and a 'Type' of image. You can also add a description for the attachment in a free text box.

The '**Notes'** page enables you to capture any additional information you need to about the client.

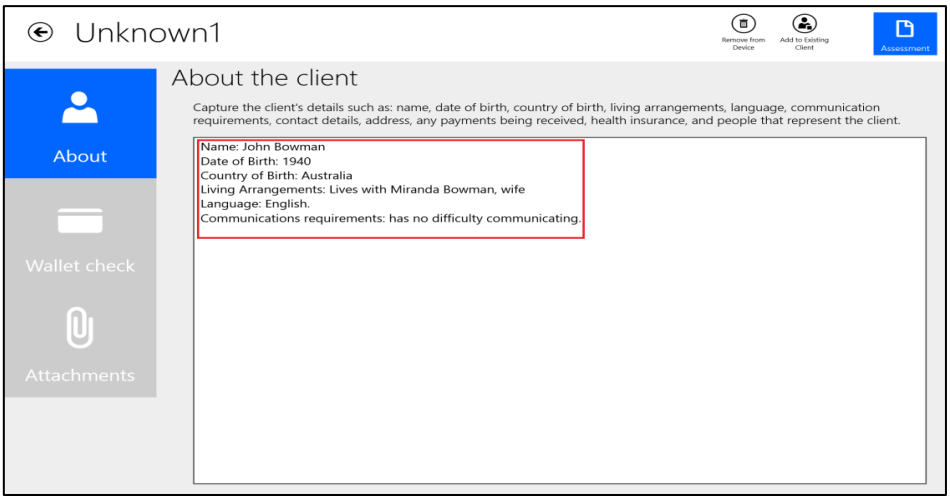


4.1 Adding information about new clients

For new clients, you will need to add client details in the 'About the client' free textbox. There is a list of things you should try to capture to assist you.

It is important that you collect the client's details. You will need to provide this information to My Aged Care contact centre staff to enable them to register or find the client.

When you upload the assessment to the My Aged Care assessor portal, this information will be formatted as an attachment. You will need to copy and paste this information into the Client details page of the client record.

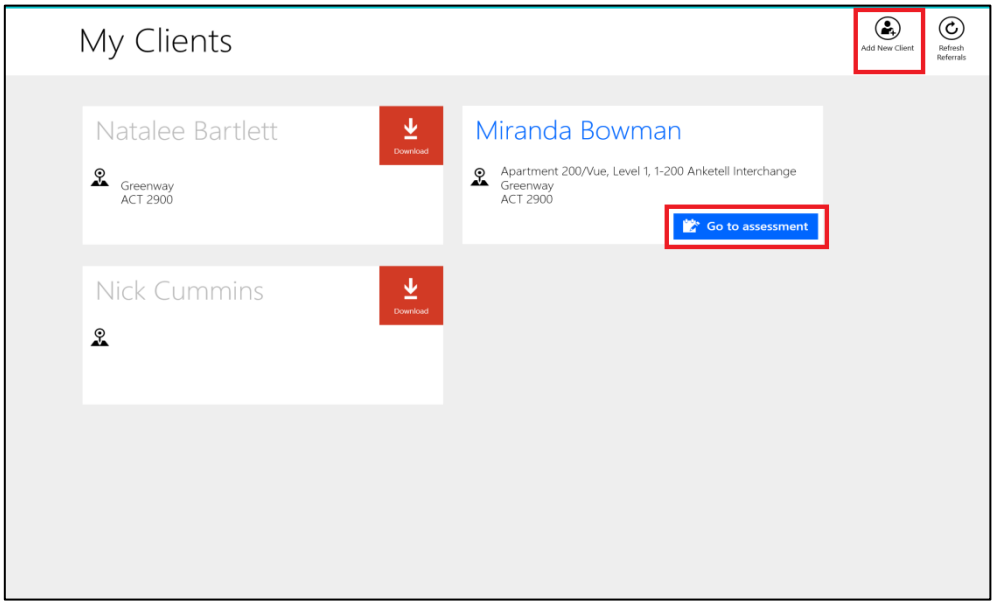

Unknown1
Remove from Device
Add to Existing Client
Assessment
About the client
About
Wallet check
Attachments
Capture the client's details such as: name, date of birth, country of birth, living arrangements, language, communication requirements, contact details, address, any payments being received, health insurance, and people that represent the client.
Name: John Bowman
Date of Birth: 1940
Country of Birth: Australia
Living Arrangements: Lives with Miranda Bowman, wife
Language: English.
Communications requirements: has no difficulty communicating.

5 Completing identity verification

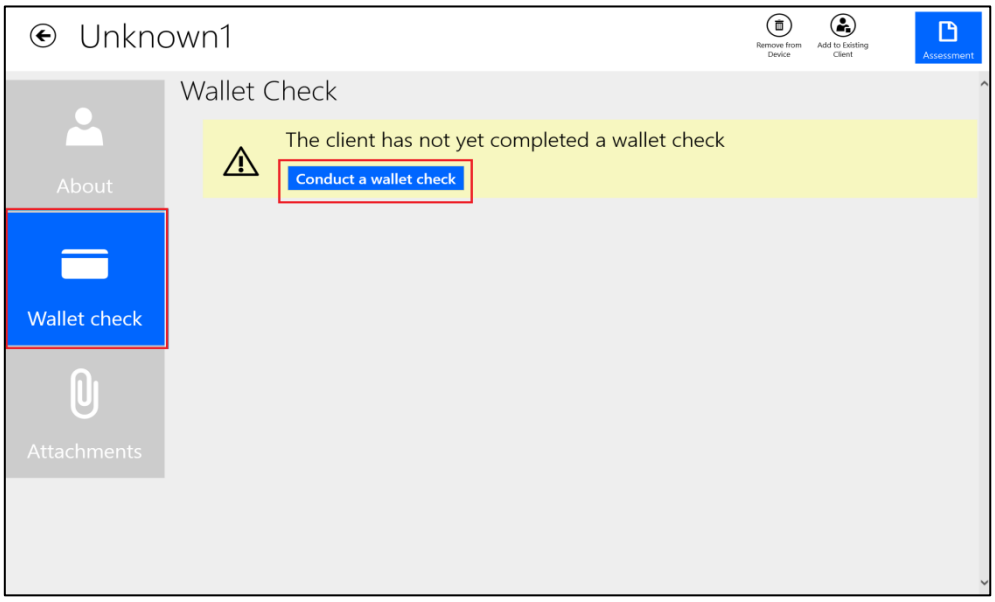
Assessors will follow the same process to complete the identity verification process for clients who have a downloaded assessment and new clients.

To conduct a wallet check follow the steps below.

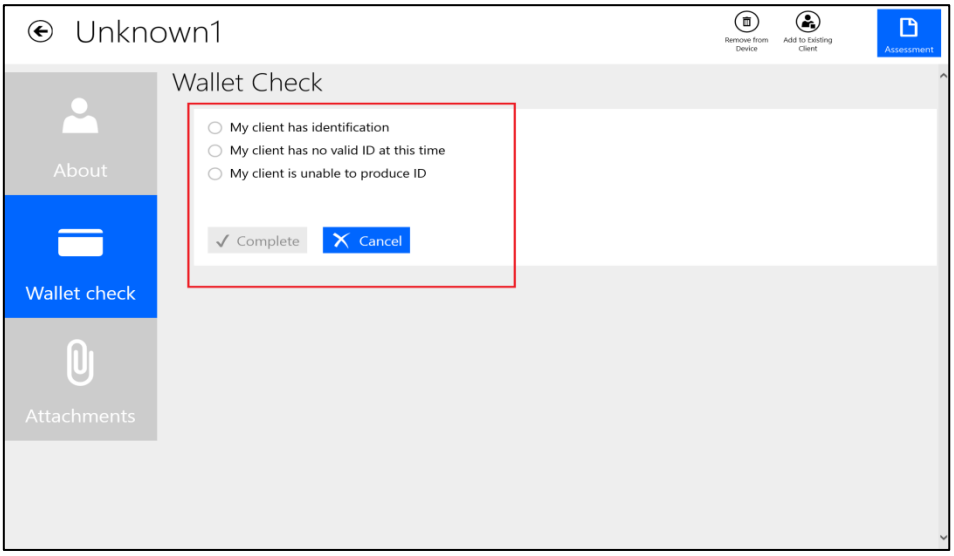
Step One: Open the app and enter your PIN, following the process in **Attachment C:** Section 2. The 'My clients' page will be displayed. Select either 'Go to Assessment' or 'Add new client'. A page with 'About', 'Wallet check' and 'Attachments' will be displayed. Note: for downloaded assessments, 'Support plans and approvals' and 'Notes' will also be displayed.



Step Two: Select 'Wallet check'. The status of the wallet check will be displayed. To conduct a wallet check select 'Conduct a wallet check'.



Step Three: A page is displayed to record whether the client has identification that will allow you to complete the process.

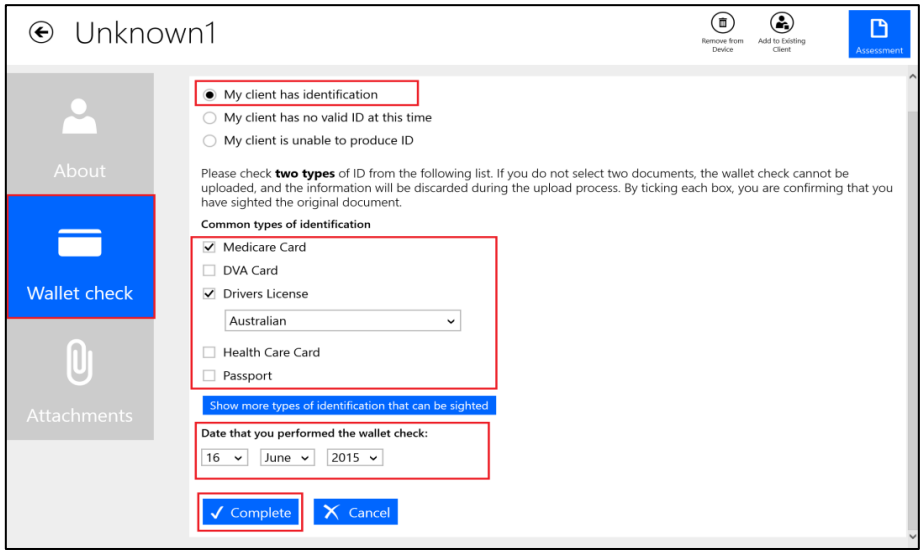


If you selected 'My client has identification', go to **Step Four**.

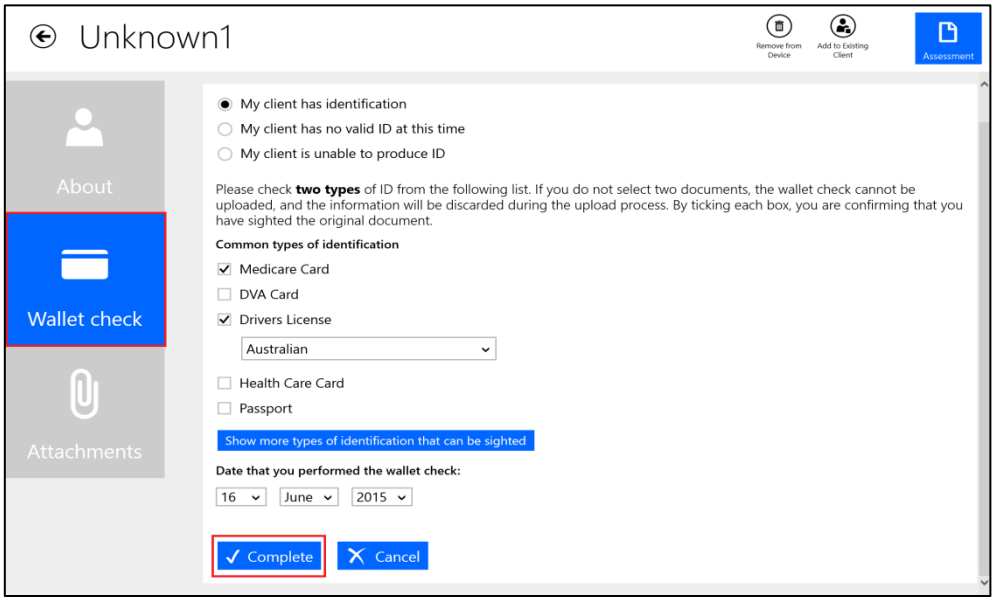
If you selected 'My client has no valid ID at this time' because the client is unable to produce the required identification during your contact with them, you will receive a message confirming that a wallet check should be completed at a later date. Go to **Step Five**.

If you selected 'My client is unable to produce ID', a message will be displayed to record that you are unable to complete the wallet check and that it will not be able to be completed at a future date, go to **Step Five**.

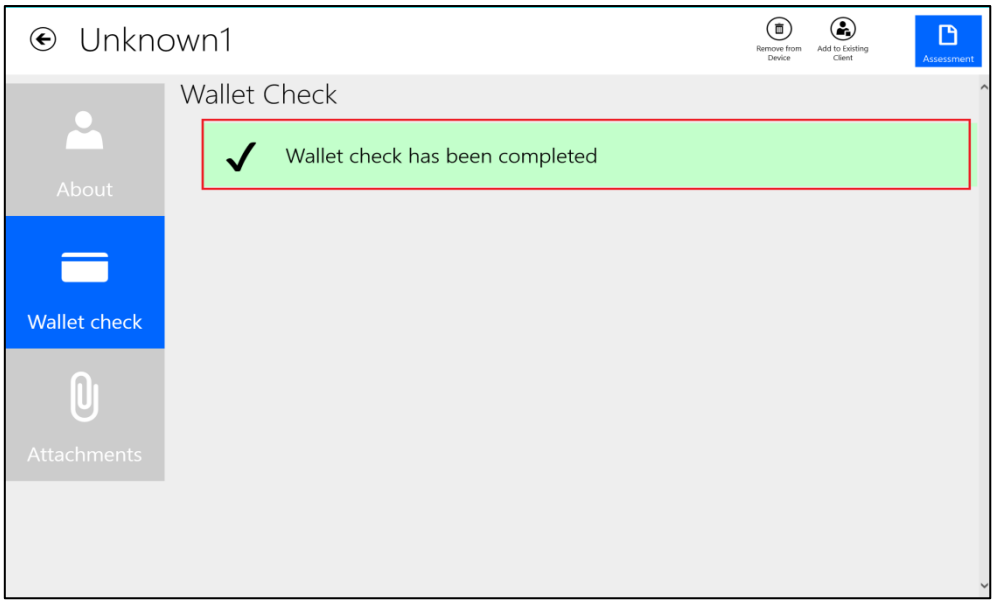
Step Four: The page will be expanded to allow you to record the type of documentation sighted, and the date that you performed the wallet check. You will need to sight **two types** of identification.


Unknown1
Remove from Device
Add to Existing Client
Assessment
About
Wallet check
Attachments
My client has identification
My client has no valid ID at this time
My client is unable to produce ID
Please check two types of ID from the following list. If you do not select two documents, the wallet check cannot be uploaded, and the information will be discarded during the upload process. By ticking each box, you are confirming that you have sighted the original document.
Common types of identification
Medicare Card
DVA Card
Drivers License
Australian
Health Care Card
Passport
Show more types of identification that can be sighted
Date that you performed the wallet check:
16
June
2015
Complete
Cancel

Step Five: Select 'Complete'.


Unknown1
Remove from Device
Add to Existing Client
Assessment
About
Wallet check
Attachments
My client has identification
My client has no valid ID at this time
My client is unable to produce ID
Please check two types of ID from the following list. If you do not select two documents, the wallet check cannot be uploaded, and the information will be discarded during the upload process. By ticking each box, you are confirming that you have sighted the original document.
Common types of identification
Medicare Card
DVA Card
Drivers License
Australian
Health Care Card
Passport
Show more types of identification that can be sighted
Date that you performed the wallet check:
16
June
2015
Complete
Cancel

If you successfully completed the wallet check a box will display to confirm that the wallet check has been completed.



If you are unable to sight two identification documents, a reminder to complete a wallet check will display in the client record until a wallet check can be completed.

6 Undertaking assessments

Assessors will be able to use the myAssessor app to:

- Undertake assessments for downloaded clients
- Undertake assessment for clients not downloaded on the device

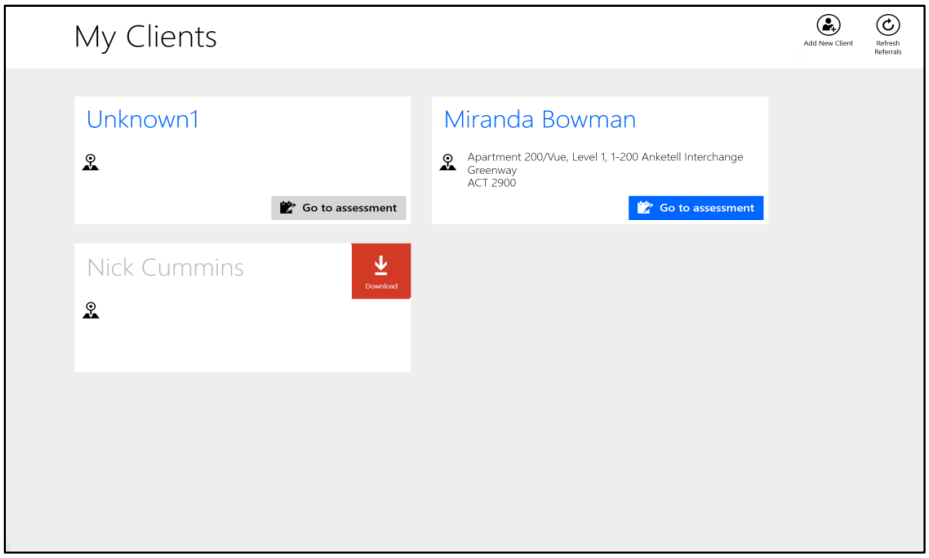
The process for undertaking assessments that you have downloaded/not downloaded is the same. You will need to capture additional client details when you conduct an assessment for a person who assessment you have not downloaded to the app.

If you need to conduct an assessment for a person whose assessment you have not downloaded to the app (for example, if the partner of the client you are assessing appears to need an assessment for aged care services), you should contact 1800 836 799 to confirm that the person does not already have a My Aged Care client record.

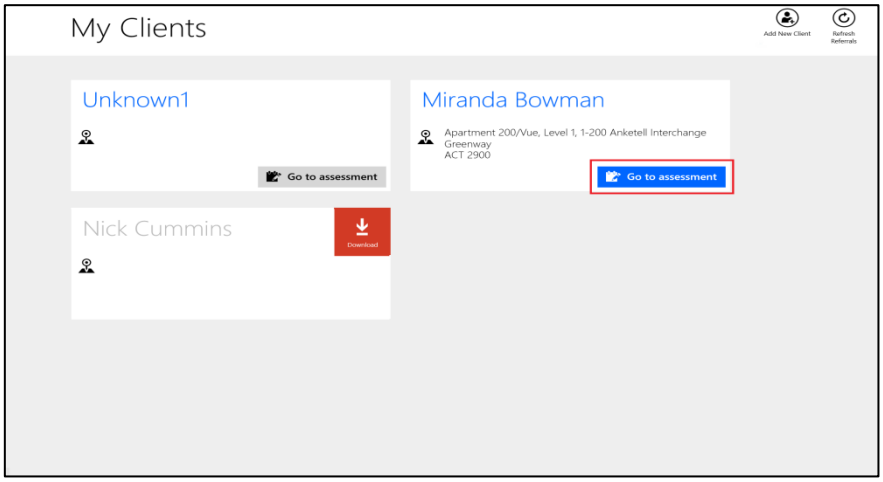
Before you can upload the assessment completed using the myAssessor app to the My Aged Care assessor portal, you will need to contact 1800 836 799 to confirm that the person does not already have a client record.

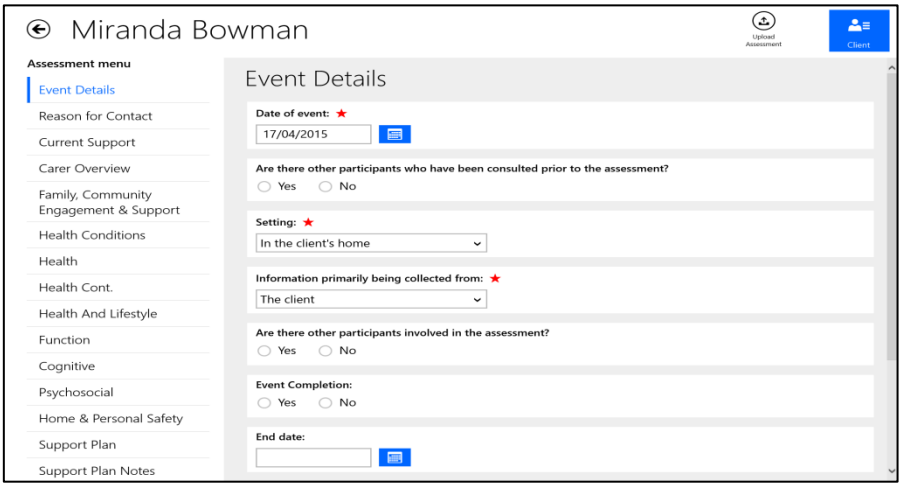
The steps to take to undertake an assessment are below.

Step One: Open the app and enter your PIN, following the process in **Attachment C**: Section 2. The 'My clients' page will be displayed.

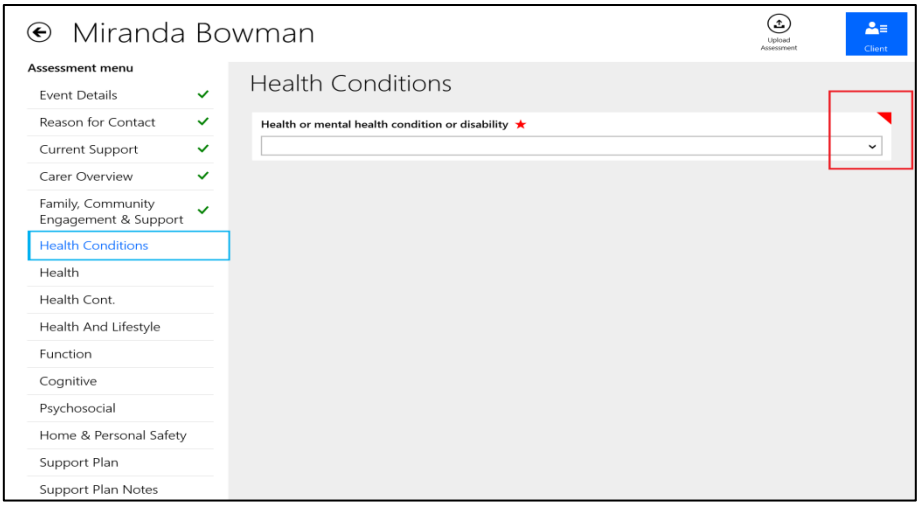


Step Two: Select ‘Go to assessment’. A page will be displayed with the name of the client you are about to assess.





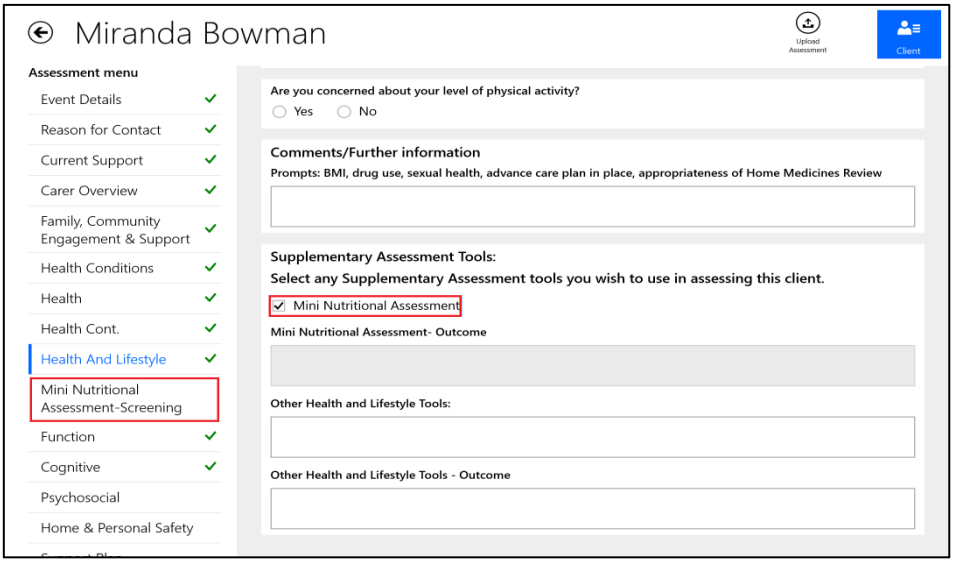
Note: Before you have entered information in the mandatory fields (marked with stars), you will see a red triangle in the top right hand side of the box.



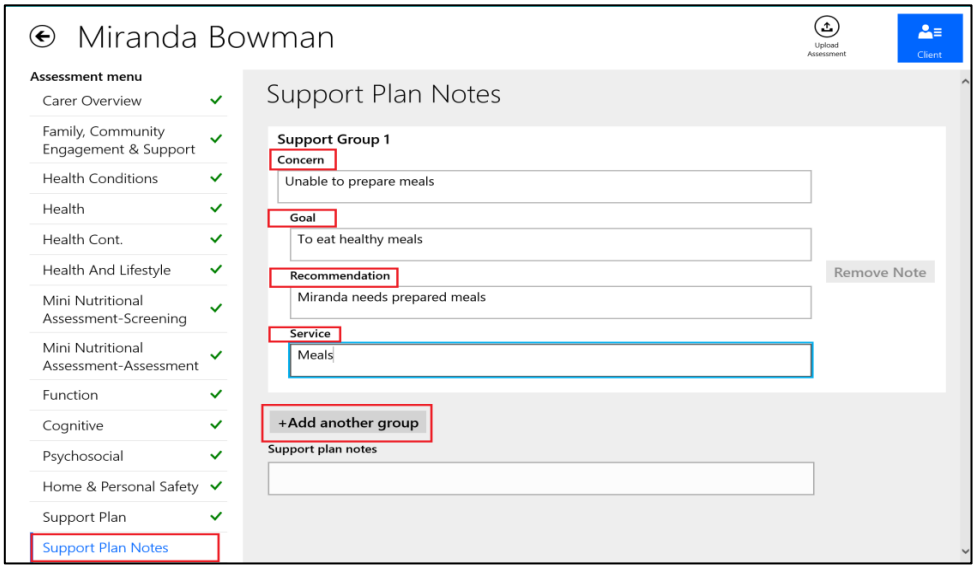
When you answer the question, this triangle disappears. This feature helps you see what questions you need to answer in each section.

Step Three: Undertake the assessment. When you have completed the mandatory questions in each section, a tick will appear beside the screen in the list down the left hand side of the page.

During the assessment, assessors can access Supplementary Assessment Tools to use during the assessment. When you tick that you would like to use a Supplementary Assessment Tool, the tool will be listed automatically under the relevant section.



Step Four: When you have finished the assessment, you will add information in the 'Support Plan' and 'Support Plan Notes' sections. Please note that you will need to use the 'Support Plan Notes' section to develop the support plan.



You can complete an assessment on the myAssessor app without answering all mandatory questions. OPA decision support draws on the information gathered in the mandatory questions, so you will need to answer these questions before you can finalise the assessment after it is uploaded to the My Aged Care assessor portal.

Assessors are expected to contact the client to confirm the outcome of the assessment, discuss the client's service preferences, and obtain consent to send referrals for service(s) or to waitlist.

When you undertake an assessment using the app, you should agree to a preliminary support plan with the client. To finalise the support plan and send referrals for service or to waitlist, you need to upload the assessment to the My Aged Care assessor portal.

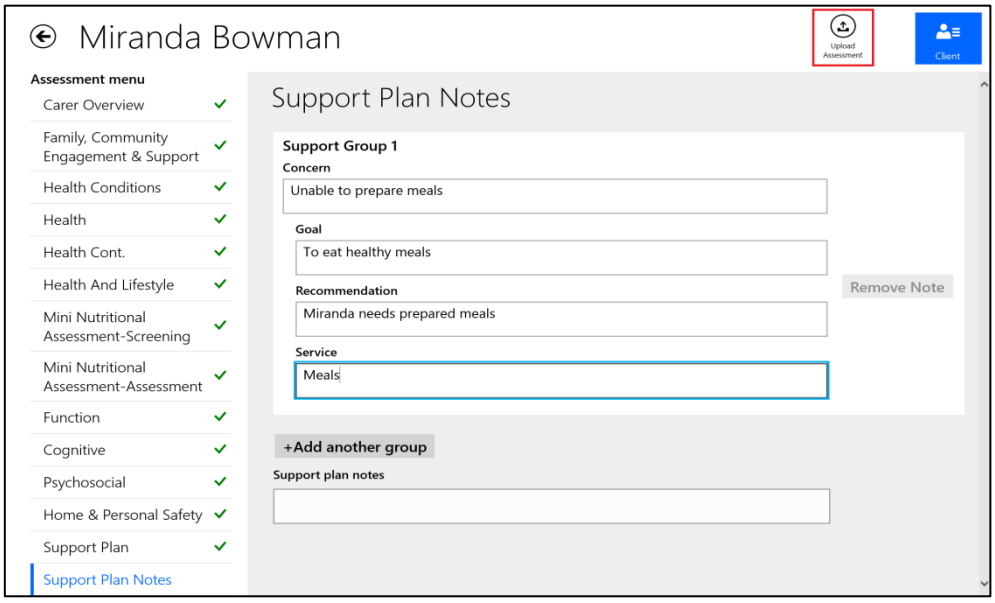
7 Uploading assessment information

The device must be connected to the internet to upload the assessment.

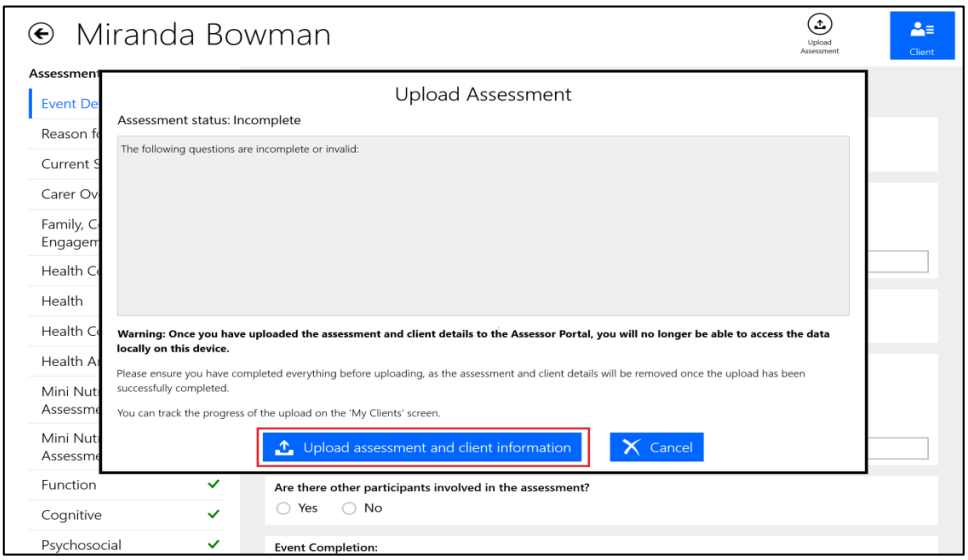
7.1 Uploading assessment information for downloaded assessments

To upload assessment information for downloaded assessments follow the steps below.

Step One: To upload the completed assessment to the My Aged Care assessor portal, select 'Upload Assessment' from the 'Client Record' screen or the 'Assessment' screen.



Step Two: An 'Upload Assessment' box will display. Confirm that you want to upload the assessment by selecting 'Upload assessment and client information'.


Miranda Bowman
Upload Assessment
Client
Upload Assessment
Assessment status: Incomplete
The following questions are incomplete or invalid:
Warning: Once you have uploaded the assessment and client details to the Assessor Portal, you will no longer be able to access the data locally on this device.
Please ensure you have completed everything before uploading, as the assessment and client details will be removed once the upload has been successfully completed.
You can track the progress of the upload on the 'My Clients' screen.
Upload assessment and client information
Cancel
Function
Cognitive
Psychosocial
Are there other participants involved in the assessment?
Yes
No
Event Completion:

The confirmation box displays a list of mandatory questions that are incomplete or invalid. Incomplete or invalid questions will not prevent you from uploading the assessment, however, you will need to complete all mandatory questions before you can finalise the assessment in the My Aged Care assessor portal.

Step Three: The assessment will be uploaded to the My Aged Care assessor portal. The information you added as part of the NSAF will automatically populate to the record in the assessor portal.

The support plan will appear an attachment to the client record. You will need to copy and paste these notes into the appropriate fields in the support plan.

Any other notes entered in free text boxes will also appear as attachments to the client record. You can copy and paste this information into the appropriate fields.

Once uploaded, you will not be able to access the downloaded assessment locally on the device.

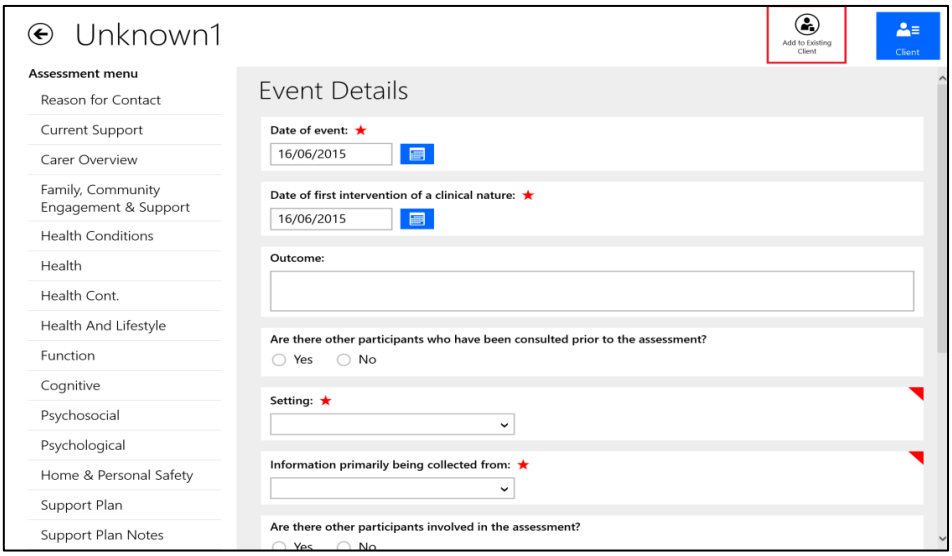
Step Four: Follow the steps outlined in Section 3.6.6 to complete the support plan.

7.2 Uploading assessments for new clients

To upload assessment information for new clients follow the steps below.

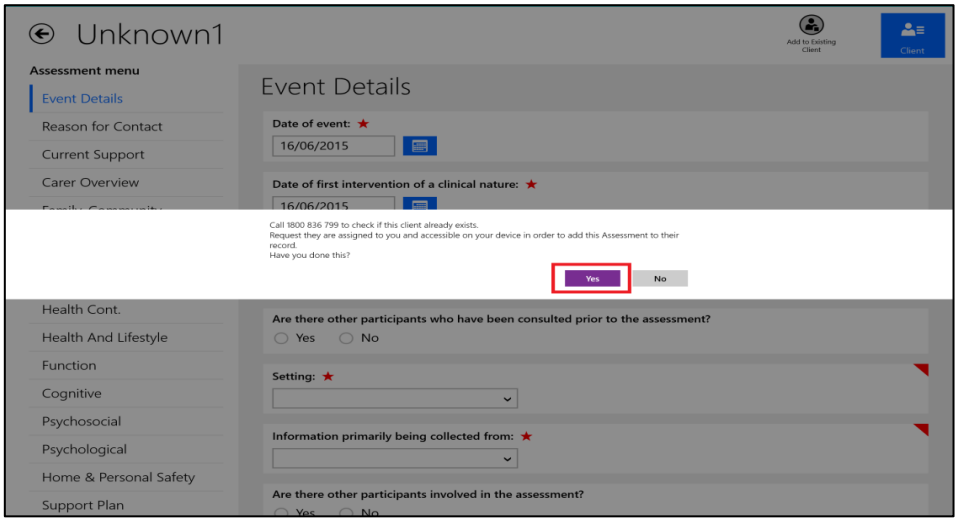
> Before you can upload an assessment for a new client completed using the myAssessor app to the My Aged Care assessor portal, you will need to contact 1800 836 799 to confirm that the person does not already have a My Aged Care client record.

Step One: Select 'Add to existing client'.

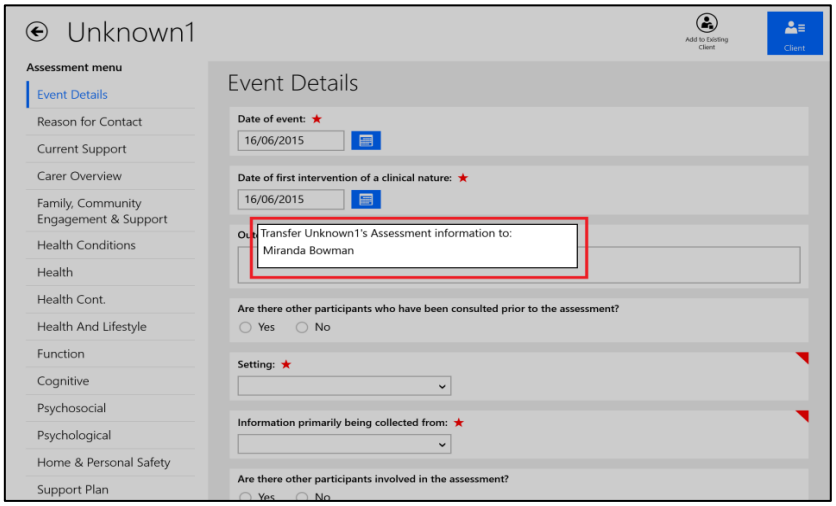


Step Two: You will be prompted to call 1800 836 799. If you have already contacted the contact centre, and had a referral sent to your organisation, select 'Yes'.

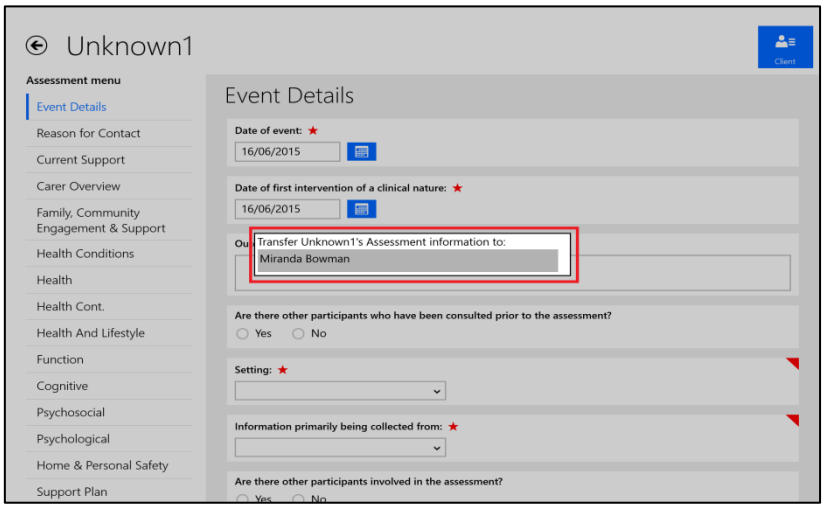
Note: A person assigned the Team Leader role in the My Aged Care assessor portal will need to accept the referral and assign the referral to you before it appears in your referral queue.



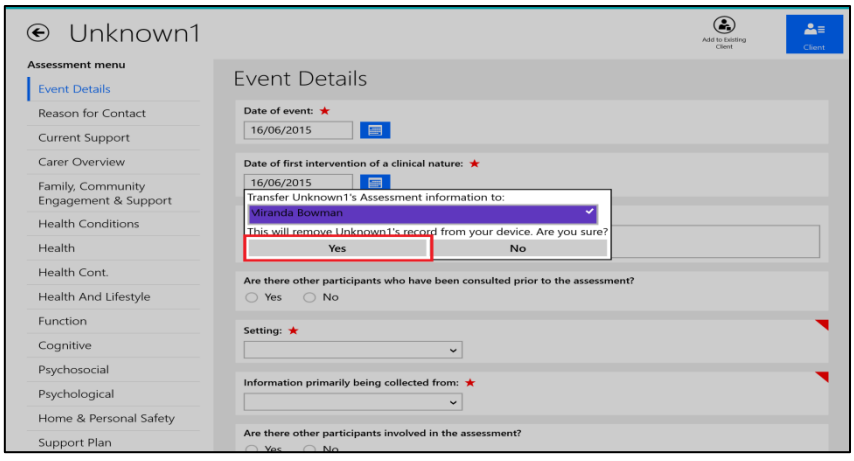
Step Three: A list of clients that you can transfer the 'new client' to will appear.



Step Four: Select the name of the client you want to add the 'new client' to.



Step Five: You will be asked to confirm. Select 'Yes'. The 'new client' will now be added to the existing client, and you will be able to upload the assessment information following the steps outlined in **Attachment C**: Section 7.



8 Completing the match and refer process and finalising the assessment

To complete the match and refer process, see Section 3.7.

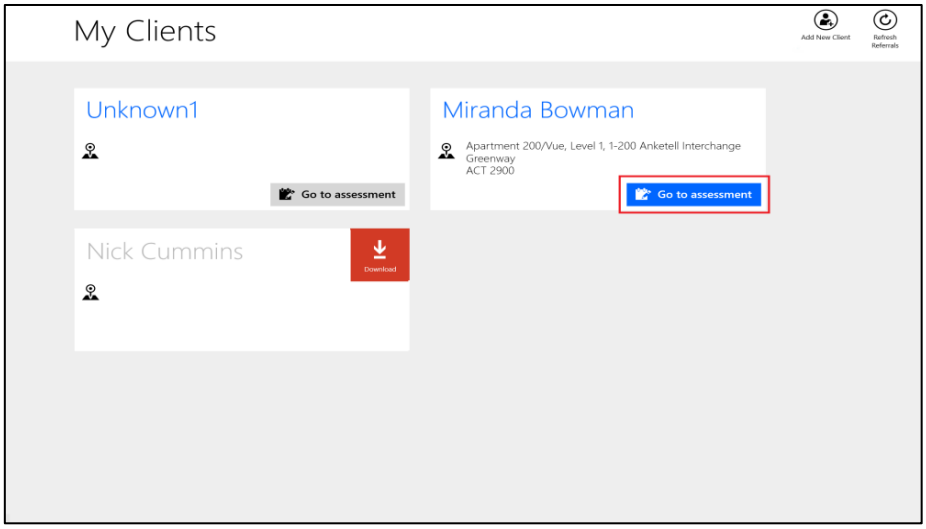
If you have undertaken an assessment using the myAssessor app, you need to contact the client to confirm the outcome of the assessment and obtain their consent to send referrals for service(s) or to waitlist.

9 Removing assessments from the device

> Removing a downloaded assessment from the device will permanently delete the record from the device.

To remove a downloaded assessment from the device follow the steps below.

Step One: Open the app and enter your PIN, following the process in **Attachment C**: Section 2. The 'My clients' page will be displayed. Select 'Go to assessment'.



Step Two: From the 'Client' page, you can remove the record from the device by selecting 'Remove from Device'.